T O U R I S M

A MARKETING AND DEVELOPMENT PLAN FOR THE FRESHWATER FISHING RESORTS OF BRITISH COLUMBIA

ECONOMIC & REGIONAL DEVELOPMENT AGREEMENT

Canada

BC

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A. INTRODUCTION

In March 1988, the Ministry of Tourism, Recreation and Culture released a comprehensive analysis of the fishing resorts sector within British Columbia. The study, titled *Fishing Lodges in British Columbia, Marketing and Development Initiatives* provided precise data regarding the scope and impact of both freshwater and saltwater fishing resorts and included an overview of markets served and marketing methods used by operators. This study is referred to as Phase One throughout much of this document. The Phase One study showed that the markets served by freshwater operations differed substantially from those served by the saltwater resorts and furthermore, the freshwater sector is differently organized and structured. As a result of this study and in response to requests from the B.C. Freshwater Fishing Resorts and Outfitters Association for assistance , the Ministry decided to commission a Marketing and Product Development Strategy. The objectives of the Strategy project were outlined as follows:

"Provide the various sub-sectors of the Fishing Lodge and Resort Industry with a program for both marketing and communications, and development. The program will include the following:

1. strategies for marketing and development including organization of the industry, responsibilities and requirements;

2. a communication strategy outlining the positioning of the product, the role and character of the communication, target markets and rationale;

3. a final and comprehensive marketing and communications plan providing rationale, strategies, objectives, audiences, messages, methods, timing, responsibilities, budget and procedures for evaluation; and

4. a proposal for development including rationale, strategies, type, location, timing, budget, outcome and solutions to constraints".

The Marketing and Development Strategy outlined in this document is not intended as a detailed blueprint as the efforts and resources of multiple agencies need to be involved in its implementation. It does, however, provide an integrated and long-range approach to marketing and development that can assist in the more effective co-ordination of activities undertaken by industry and government.

B. SITUATION ANALYSIS

1. THE PRODUCT

According to the Phase One study, the lodges that service the freshwater fishing industry in British Columbia generated $21 million in revenue from 130,000 guests who stayed a total of 545,000 guest-nights. Their average stay in a resort was 4.2 nights.

The Phase One study identified 206 resorts (defined as lodging properties which derived more than 40% of their revenues from fishing related activity), of which 75% grossed over $25,000.

The hallmark of the freshwater fishing industry is diversity: resorts vary significantly in their size, capital investment, number and quality of amenities, pricing, species orientation, geographical and ecological setting, access, market orientation and type of experience offered. In the Phase One study, three product groupings were identified on the basis of revenue and experience offered. Their characteristics are summarized in Exhibit 1.

By the spring of 1989, the B.C. Fishing Resorts and Outfitters Association had 75 members and, for the purpose of this marketing plan, these members are considered to be the client group. Member operations encompass most of the range of resort facilities available in the Province. Approximately 55% of the members also offer camping for a total of 940 camping sites..

The freshwater fishing resort industry has the following performance characteristics:

- **Low Occupancies**: from May to October, the occupancy rate averages 48%
- **Low Per Diem rates**: $38 per person, per night compared to $310 for saltwater operations
- **Marginal profitability**: many resorts have insufficient working capital to upgrade facilities.
- **Limited Packaging**: 50% of the resorts do not offer packages
- **A heavy reliance on "rubber-tire traffic"**: 70% of resort clientele arrive by car.
- **Lack of Co-ordination**: the Association represents only one third of all resort operators. Up until recently, there has been little collective marketing activity.

Exhibit 1

CLASSIFICATION SYSTEM OF FRESHWATER FISHING RESORTS

1. High Quality, Fly-in Facilities

The majority of fly-in facilities are located in remote northern locations and provide a wilderness experience comparable to that provided in the Yukon and NWT. The facilty is seasonal, generally operates from June to September and provides from 50 - 100 beds in lodges or cabins. These are full service operations, providing a lounge and dining room for the exclusive use of their guests. Most have been in operation for 20 years or more. These fly-in operations largely offer lake and river fishing, but other outdoor activities associated with remote locations -- hunting, hiking, trail riding, and canoeing/kayaking -- are also available to their guests. The major species offered from these remote lodges are lake trout, rainbow trout, steelhead and Dolly Varden.

All services are packaged and the avid fisherman is willing to pay a substantial price for a high quality fishing experience in a remote location. Prices per day for all inclusive packages generally are in the $400-$500 range and many packages are for up to 7 days. Guests are generally from outside the province, in many cases from the U.S. West Coast down to California, and one or two operators have substantial visitation from Europe.

The operators market quite heavily with advertising budgets in the range of $20,000 to $30,000 per facility. They use a wide range of promotional avenues, including brochures, magazine ads, consumer shows, and direct mail.

2. Medium Sized, Family-Oriented Resorts

The medium scale freshwater facilities typically have gross revenues of $100,000 to $300,000 and attempt to offer a quality fishing experience at a modest price. Most guests (63%) drive to the lodge/resort and the facilities cater to short-haul markets. About one-half of the facilities have been in operation for over 20 years and close to half do not own the land on which their operation is located. Some operations, therefore, have aging plant and equipment but do not have the tenure and security needed to support capital investment.

Only 4 of the 17 facilities operate year round and the typical season is from May to October. More than 50% of the medium-scale freshwater facilities are defined as multiple product operations and, therefore, derive more than 10% of their business from activities other than sport fishing. However, while these operations are attempting to diversify their product offerings, their low occupancy rates would suggest these efforts so far are meeting with mixed success. The facilities and services on the property are designed to cater to the basic needs of the sport fisherman. Only a quarter of these facilities offer only packages. Sale of individual services is the norm.

Compared to the larger freshwater facilities, the medium-scale facilities cater more to British Columbia markets (26% of clientele) and to other short-haul markets. However, an additional 5% of the clientele is from Europe (compared to very limited visitation to saltwater properties from European countries).

CLASSIFICATION SYSTEM OF FRESHWATER FISHING RESORTS

2. Medium Sized, Family-Oriented Resorts (continued)

Compared to larger facilities, medium-scale freshwater facilities cater more to families and couples than to singles and groups.

A typical medium sized freshwater lodge spends about $10,000 per year on marketing compared to average gross revenues of about $140,000 per property. The most prominent forms of marketing and promotion are brochures, magazine ads, the Accommodation Guide and word of mouth.

3. Small/ Lifestyle-oriented Operations

These freshwater operations with gross revenues less than $100,000 provide basic fishing services in a rustic setting. Many owners appear to operate their facilities as a hobby, as a seasonal residence or to supplement their income. The evidence suggests that few generate sufficient revenue and net income to provide a full salary to their owners. While all 78 operations in this grouping have some form of fixed roof accommodation, about 75% of their guests are accommodated in trailer sites.

Nearly 70% of these establishments have been operating for over 20 years, and only 15% have been established in the past 10 years. Plant and equipment, therefore, are aging and maintenance costs must be climbing. Better than a third are multi-product facilities and many are attempting to diversify their product offerings in an apparent attempt to capture new markets. Their low occupancy rates suggest their success to date has been limited. Packages are sold by less than one-half of the properties.

These small operations largely focus on the British Columbia market, with local people (17%) and the rest of the province (28%) comprising nearly 50% of their client base. All but 15% of their guests arrive at the lodges by car, and families and couples comprise three quarters of their guests. These operators attract a somewhat younger clientele than other resorts/lodges. The typical small operator spends about $2,500 per year on marketing, which amounts to about 7% of the facilities' annual gross revenues of $36,000. These properties mainly depend on word of mouth, the Accommodation Guide and brochures to get their message across.

Source: Fishing Lodges and Resorts in British Columbia, Marketing and Development Initiatives, the DPA Group, 1988

Strengths

1. British Columbia's fishery is a world class product, offering not only some of the finest rainbow trout in the world and most exciting steelhead fishing, but the opportunity to fish wild fish stock in pristine, uncrowded settings.

2. The diversity of product offerings, settings and species can be a major strength. Consumers can choose between accessible resorts off major highways and remote "fly-in" wilderness lodges. Lodging varies from campgrounds, rustic self catering cabins through to deluxe resorts. Customers can choose to fish alone or be accompanied by skilled and knowledgeable guides. There are resorts which appeal to families seeking fun in the outdoors and others which cater to "serious" fishermen. Anglers or recreationists can choose between a multitude of species which can be caught in either lakes, rivers or streams located in at least five different ecological zones.

3. The quality of the natural environment and lack of pollution and crowding compared to other more populated areas of the United States and Eastern Canada are major strengths. In vast areas of the province, human population densities rank third behind moose and bears. In virtually all the consumer research undertaken for freshwater fishing lodges, satisfaction with and the importance of the pristine wilderness settings available in British Columbia rank more highly than the fishing experience itself.

4. Most of the stocks are wild fish. Generally speaking, the value of the fishery is recognized by government and, providing improved economic returns can be demonstrated, the outlook for continued wise management is positive.

5. There is a pool of knowledgeable and skilled guides who can add significant value to the fishing experience for certain market segments.

6. The industry is perceived as offering high levels of hospitality and personalized service, and generates considerable brand loyalty in the form of repeat visitation. As many as 90% of resort users are repeat clients.

Weaknesses

1. Most freshwater operations are small -- only 10% gross over $500,000 and as many as 75% gross less than $25,000. Consequently, the majority of the industry's establishments are low revenue properties operated by their owners as a seasonal residence, as a hobby, or for lifestyle purposes. This small scale nature of the industry severely limits the amount of marketing and new market development that individual operators can realistically undertake.

2. The relatively small number of truly commercial fishing lodges (i.e.. those who are seriously in the business of attracting and catering to visitors) are spread over enormous geographical distances. This makes organizing collective action particularly difficult, expensive and time consuming.

3. The physical plant of many operations is old (greater than 20 years) and badly in need of upgrading. Many operations do not provide the type of facilities and services which the customer would like.

4. Pricing strategies are not consistent with consumer expectations. While as many as half of the market prefer single package prices, the majority of operators offer a mix of products on a separate billing basis.

5. While the remoteness of most resorts is an attractive selling feature, it can impede sales. Poor telecommunications in the form of radio telephones and shared party lines restrict operator's ability to "close a deal" and respond to impulse purchases.

6. As a tourist resource, the province's freshwater fishery is overshadowed by the saltwater fishery. Non-resident consumers tend to associate British Columbia with Salmon. The commercial success of aggressive saltwater operations tends also to attract greater attention from both government and corporate marketing sponsors.

7. Lower levels of capital investment, less aggressive marketing and, consequently, lower per diem rates mean that the freshwater fishery is not currently realising acceptable yields from the resource given its international calibre.

8. Increasing pressures on the land resource from extractive industries such as forestry and mining, increased demand for the fishery on the part of non-residents and residents, declining freshwater stocks in some rivers and lakes, and lowered water levels in some lakes are necessitating long-term resource management programs that may restrict access in certain areas.

9. It is currently difficult for consumers to determine the nature of a resort product prior to trial. No grading or classification scheme exists which could facilitate effective product market matching.

10. Because of the size of operations and the backgrounds of the resort owner-managers, many lack professional marketing, management and financial skills to upgrade and expand their product to meet the increasingly demanding requirements of today's sophisticated consumers.

11. While the industry enjoys high levels of satisfaction with its existing client base, as evidenced by the high levels of repeat visitation, there is a real possibility that the product is not attracting new and emerging markets. Without developing new markets, the existing revenue base will inevitably decline.

2. THE MARKET

The size and nature of the market for British Columbia's Freshwater Fishing Lodges has been determined from a number of sources:

Freshwater Sport Fishing in British Columbia, 1985, a survey of licence holders conducted by the Ministry of Environment;

Fishing Lodges and Resorts in British Columbia, Marketing and Development Initiatives, prepared for the Ministry of Tourism by DPA Group Inc and MacLaren Plansearch, 1988;

Telephone surveys of a random sample of 85 freshwater licence holders resident in the Lower Mainland region of British Columbia conducted in 1989 specifically for the marketing plan;

Telephone surveys of a random sample of 100 British Columbia freshwater fishing licence holders resident in the Province of Alberta;

Telephone surveys of a random sample of 60 British Columbia freshwater fishing licence holders resident in the State of Washington;

Sports Participation in 1986, Series 1 and Series 2, National Sporting Goods Association.

Market Size

In the 1987/88 fishing season, approximately 390,000 freshwater fishing licences were sold in British Columbia; an increase of 8% since 1985/86. Of this total, 78% were purchased by residents of British Columbia and 22% were purchased by visitors. According to the Ministry of Environment's survey, the vast majority of non-resident licence holders in 1985 originated from Alberta (32,000 licence holders came from this Province). In addition, the Pacific Census Region of the United States also accounted for 9% of total licence sales. Thus the overwhelming majority of visiting anglers come from British Columbia's "close in" markets. The resource currently attracts a very small number of long-haul visitors.

Market Penetration

Not all licence holders stay at fishing resorts. Some take day trips only,others prefer to camp, stay with friends and relatives, or own their own cabins. Of the licence holders resident in the Lower Mainland of British Columbia, approximately 30% indicated that they had stayed at a fishing resort at least once. The propensity of non-resident licence holders to stay at a resort appears to vary significantly with origin. While 58% of the Washington sample had visited a resort or lodge, only 16% of the licence holders from Alberta had done so. Most Albertans preferred to stay with friends or relatives, or go camping.

Current and Potential Markets: Resident

The survey of British Columbia licence holders revealed several differences between those licence holders who had stayed at a resort in B.C. and those who had not; these findings suggest areas of future market potential. The two groups will be referred to as "users" and "non-users" respectively.

Survey of Residents

What Factors Are Important in Choosing A Resort?

Exhibit 2 shows that users of a B.C. lodge/resort appear to rank selection factors quite differently than those licence holders who have not yet stayed. While both groups consider natural scenic beauty to be the most important factor, past users rate ease of travel time and alternative recreational facilities as more important than do non-users. By contrast, non-users rate service, amenities and the number, size and species of fish caught, as significantly more important than existing resort users. The availability of alternative recreational facilities is less important to this group.

These findings may imply that there is a domestic market of relatively enthusiastic fishermen (i.e., licence holders) who could be attracted into a resort provided they were assured of quality service and an excellent fishing experience.

The results also suggest that B.C.'s fishing resorts and lodges are currently attracting a clientele for whom the fishing is secondary to the total resort experience and who value convenience and the chance to participate in other recreational activities.

Lodging Preferences

Generally speaking, non-resort users (55%) were more inclined to indicate a preference for quality or mid-range accommodation than past users (31%). Conversely, users (69%) prefer either rustic accommodation or campgrounds; only 45% of non-users stated a preference for these less expensive forms of lodging. While the majority of respondents spend less than $50 per person per night on accommodation, a larger share of the non-users (25%) indicated a willingness to spend more.

Users and non-users also differ in the way they prefer to pay for their experience. Over half of the non-users (55%) would prefer an all-inclusive package price while 65% of the users prefer a separate billing.

Exhibit 2

Relative Importance of Selection Factors to British Columbians In Choosing A Resort		
	Recent Users	**Non-Users**
Ease of Travel Time	57%	59%
Remoteness	65%	59%
Price	70%	76%
Service	57%	90%
Guides	22%	38%
Amenities	39%	52%
Alternative Recreational Options	61%	34%
Natural Scenic Beauty	87%	79%
Number of Fish Caught	39%	62%
Size of Fish Caught	22%	59%
Species	30%	64%

Source: telephone survey of licence purchasers resident in the Lower Mainland, Tourism Research Group, 1989

The results of this survey of licence holders suggest that in order to convert licensed non-users of resorts into users, they will have to be convinced that they can obtain a package of quality fishing, amenities and service in British Columbia. They appear willing to spend more on this experience than the existing market providing they are assured that the B.C. product can deliver.

Product Knowledge

Fortunately, one of the reasons for non-use is a lack of information about the product as perceived by the consumer; 65% of the non-users felt they lacked sufficient information with which to make a decision and 68% of the non-users rated their knowledge of British Columbia's existing resort product as poor; 25% rated it as fair and only 4% rated it as good or excellent.

Preferred Media

The majority of survey respondents (42%) considered that a provincial map, showing all fishing areas and distinguishing between species, would be the most effective. Next in importance would be a directory of all fishing lodges/resorts. Third in importance were advertisements or articles in local community newspapers (19%), and TV or radio advertising (19%). Articles in Outdoor Magazines (16%) were considered to be more effective than articles in Travel Magazines (9%) and only 2% of the respondents indicated that an information hot-line would be effective.

Evaluation of the Fishing Experience In British Columbia

Despite their lack of knowledge regarding resorts, the non-users rate the freshwater fishing experience very highly: (44% said "excellent" and 33% said "good"). In fact, they rate it more highly than licence holders who have stayed at a resort. 39% of the users ranked the freshwater fishing as fair, and only 26% gave it an excellent rating).

What Potential Does This Market of Anglers Have?

According to the survey, approximately 20-25% of the B.C. licence holders have not stayed at a resort but would consider doing so in the future.

The Challenge

As far as the domestic market is concerned, the research of the Lower Mainland users suggests that we should concentrate on the following:

1. Getting the existing market of users to increase their frequency and expenditures ;

2. Capture new markets; i.e., people who have not been regular licence holders and whose profile is similar to existing resort users; and

3. Persuade British Columbia's anglers to stay at a resort; in other words to convert non-users to users. Given that these non-users consider the fishing experience to be important, and given that they perceive the opportunities for that experience to be excellent in British Columbia, the resorts must deliver sufficient consumer information on the quality of service, amenities and fishing to convert this target market into resort users. At the same time, the resort industry must take steps to ensure that there is, in fact, sufficient product of the quality necessary to meet this more demanding market segment.

Current and Potential Markets: Non-Resident

Of the 390,000 freshwater fishing licences sold in British Columbia in 1988, 9% were purchased by Albertan residents and another 9% were purchased by residents of the Western Region of the United States (California, Washington and Oregon).

Survey of Non-Residents

A telephone survey of 60 Washington residents and 100 Alberta residents who had purchased a B.C. fishing licence in 1987 was undertaken to determine their travel behaviour and perceptions of the B.C. freshwater fishing product. The survey showed that compared to Alberta and British Columbia licence holders, Washington visitors are already highly predisposed to staying at a resort or lodge: 58% had done so previously. Of these former users, the majority (77%) "like to stay at a lodge where they can concentrate on fishing" and 20% prefer a lodge which offers other activities besides fishing. Albertans, on the other hand, are least likely to have stayed at a resort or lodge -- only 16% of the sample had used commercial roofed accommmodation. Most of the Alberta non-users preferred to stay with friends or go camping and a higher proportion (38%) preferred lodges which offered a range of alternative recreational activities. Only half of the Alberta sample like to stay at a lodge where they can concentrate on fishing.

What Factors Are Important in Choosing A Resort?

The factors considered important in selecting a lodge or resort varied according to origin and also between users and non-users. While natural scenic beauty rates highly for all groups, Washington resort users place far more importance on service and the quality of fishing than do their Alberta and British Columbia counterparts. Only 14% of past Washington resort users rated the availability of alternative recreational facilities as important. While Albertans seem to be most price sensitive (73% rated this factor as important) and least concerned about service, the non-users do rate the number and size of fish caught as important. They seem less concerned, however, about the species of fish.

Lodging Preferences

In general, non-residents indicated a stronger preference for camping and less of a preference for quality accommodation than did residents. There seems to be a concern for price, especially among Washington visitors who prefer rustic or camping accommodation (53%) and generally pay less than $50.00 per person per night (76%). This price concern is also reflected in "Factors Important in Selection of Resort" (see Exhibit 3), where 81% of Albertans and 75% of Washingtonians showed a sensitivity to price.

It is interesting to note that in the Washington sample, the type of lodging preferred differed substantially from users to non-users -- 32% more users than non-users preferred quality or mid-range accommodation, while non-users were more camping oriented. Despite this trend, only 24% of Washington visitors actually pay over $50.00 per person per night. This could suggest that either there is an inadequate supply of quality accommodation or that what Washingtonians prefer and what they can actually afford are two different things.

As was the case with the resident market, all-inclusive package prices are popular with the non-resident market--44% of non-residents would prefer to pay for their experience in an all-inclusive package price. These results suggest that there will have to be plenty of all-inclusive packages to offset separate billing in order to appeal to non-resident licence holders. These packages will need to offer quality fishing and service, and show a sensitivity to price.

Product Knowledge

As was the case with British Columbia residents, one of the reasons for non-use is lack of information--84% of Albertans surveyed did not stay at a lodge or resort while fishing in B.C., and over 65% of those non-users indicated that they did not have enough product information with which to make a decision. Similarily, 45% of Washington visitors indicated that they did not have enough product information with which to choose a new lodge or resort.

Exhibit 3

Relative Importance of Selection Factors to Alberta and Washington Residents In Choosing A Resort		
	Alberta	**Washington**
Ease of Travel Time	58%	55%
Remoteness	62%	67%
Price	81%	75%
Service	59%	78%
Guides	30%	20%
Amenities	46%	42%
Alternative Recreational Options	41%	20%
Natural Scenic Beauty	86%	88%
Number of Fish Caught	65%	61%
Size of Fish Caught	65%	63%
Species	51%	61%

Source: telephone survey of licence purchasers resident in Alberta and Washington, Tourism Research Group, 1989

86% of Albertans and 70% of Washingtonians also indicated that they had fair or poor knowledge of the variety of lodges and resorts in the province.

Preferred Media

22% of Albertans and 24% of Washington license holders indicated that a provincial map showing all fishing areas and distinguishing between species would be the most effective form of media. 22% of both Alberta and Washington visitors ranked a directory of all fishing lodges and resorts as next in importance. Articles in Outdoor magazines were ranked as third (Alberta 13%, Washington 12%) and newspaper (Alberta 14%, Washington 12%), TV and radio advertising (Alberta 12%, Washington 10%) as next most effective. Albertans and Washingtonians disagreed over the importance of the hotline vs. advertisements in travel magazines. Albertans ranked the hotline as 6th (10%) and travel magazines as 7th (8%), while Washington visitors ranked travel magazines as 6th (10%) and the hotline as 7th (8%).

3. THE COMPETITION

The British Columbia sport fishing lodge/resort industry operates within a competitive environment which is generally located in western and northern Canada and the United States. British Columbia's freshwater sport fishing product is distinguished from most other products by the quality and variety of its resource.

Although competition from Canada's western provinces and territories is strong, British Columbia has an advantage in that most of its products do not overlap with the product offerings of other areas. B.C. does not offer many of the species which are found in the rest of Canada (eg. Walleye and Northern Pike), but does have species which are unique to B.C. (British Columbia is the only Canadian province in which Steelhead can be found). British Columbia, which offers a general freshwater product, is further differentiated from Manitoba, Saskatchewan and the Northwest Territories as they offer trophy fishing experiences. Within Canada, Alberta offers the steepest competition as it has the most similar fishing product and goes after the same market that British Columbia targets.

Alberta

Alberta, with its abundance of quality, fly-in fishing, offers some of the best trout, pike, walleye and Arctic Grayling fishing in Canada. Most of Alberta's fishing product is fly-in, with guided, fly-in fishing on the Bow River bringing in over $2 million in revenue in 1987. The Canadian Shield, considered the best area for fishing, is located in the extreme northeast corner of the province. Much of Alberta's fishing terrain consists mainly of marshy, forested areas.

Very few fishing lodges and resorts exist in Alberta. According to Travel Alberta, this is partly due to the fact that there are so many in British Columbia and it costs almost as much to fly there as it does to fly to northern Alberta. Campgrounds are more popular and often house campers who stay year-round.

According to a Travel Alberta survey of freshwater operators, 86% of the market comes from Alberta, 3% comes from the rest of Canada, 10% are from the United States (and this figure is growing all the time), and 1% are from other countries. With most of Alberta's market coming from the United States, and in some cases from the very southern states, it is often difficult to persuade fishermen to stop in Alberta rather than travel the extra distance to the trophy sport fishing experience of the territories.

Most promotion of Alberta's fishing product occurs in the Alberta Accommodation and the Alberta Adventure Guides. The Alberta Fly-In Lodge Association advertises in *Field and Stream* and *Fisherman* with assistance from the Canada/Alberta Tourism Agreement. Travel Alberta's 1-800 number is provided for inquiry fulfillment with the system set up so that if the caller asks for counsellor 60, operators will know that the caller saw the ad in *Fisherman*, and if the caller asks for counsellor 61, it means they saw the ad in *Field and Stream.*

Tourism Alberta also has a promotional program in conjunction with *Alberta Fishing and Hunting Magazine.* Tourism Alberta places the advertisements and, in return, the magazine visits and writes up the lodges and puts on a contest where winners receive one night's accommodation at one of Alberta's resorts.

British Columbia offers strong competition to Alberta as it provides saltwater and freshwater fishing, has numerous resorts and a natural scenic environment quite unlike anything found in Alberta.

The United States

The major U.S. competitors to British Columbia are Alaska, Washington and Oregon. British Columbia's fishing product is positioned between the general fishing product of Washington and Oregon, and the trophy fishing experience of Alaska.

Alaska

In 1987, 370,338 freshwater and saltwater anglers sport fished in the state of Alaska, up 6% from 1985. This is just slightly more than the number of adult, freshwater anglers who fished in British Columbia in 1985.

Alaska offers a similar product mix and targets the same U.S. markets as British Columbia, but does not consider British Columbia to be a competitor. The primary reason for this is that Alaska promotes a remote, wilderness fishing experience emphasizing the availability of trophy fishing. Alaska's main market is California, and for British Columbia the predicament is very similar to Alberta's: how to stop fishermen in British Columbia when they can travel a little further to do trophy fishing in Alaska?

Active promotion of Alaska's fishing product is not wide spread. The industry tends to rely on advertisements in the Vacation Planner, word of mouth and its international reputation to attract visitors to the state.

Washington

Washington state also offers a similar product mix as British Columbia as it provides both saltwater and freshwater fishing. Its freshwater fishing product, however, is different in that the emphasis is less on a world class experience than on a more general fishing experience aimed at short-haul markets.

According to the Washington State Department of Fish and Wildlife, the main problem with Washington's fishing product is the extremely small bag limit and the restriction on the number of days available for fishing. Many Washington fishermen would prefer to travel the extra distance to British Columbia where the bag limit is higher and more days of fishing can be obtained.

Washington is positioned between British Columbia and the other western U.S. states and, as such, can capture the shorter haul markets. In recent years Washington has experienced significant increases in non-resident license sales, especially from California.

Oregon

Oregon, with 29,000 miles of freshwater streams and rivers and a scenic resource base, offers significant competition in the freshwater sector for British Columbia's U.S. markets. According to the Oregon state Department of Fish and Wildlife, Oregon's primary strengths are its abundance of freshwater streams and lakes, its large resource of trout and steelhead, and the fact that most of its fishing areas can be accessed by road.

Oregon, like Washington, is also extremely well positioned geographically to cater to its fellow U.S. markets. Significant increases in non-resident license sales, with California emerging as a major market, mean that Oregon serves as a major competitor. In both Oregon and Washington states, however, the amount of collective marketing of the fishing resort product is limited and their success to date is based largely on access to a major affluent market in California. The opportunity, therefore, exists to lure more California anglers north and appeal to their desire for a more wilderness experience than the American competition south of the border can offer.

Saltwater Fishing Resorts

Saltwater fishing resorts in British Columbia, Washington, Oregon and California also act as competitors to British Columbia's freshwater resorts. Although few avid freshwater fishermen will be converted to saltwater fishing, the business, incentive and affluent family markets may be attracted to this more publicized activity.

Non Member Resorts

Non Association member resorts will also act as competition to the British Columbia Freshwater Fishing Resorts and Outfitters Association. However, as each individual lodge or resort generally has very little money to spend on marketing, it is unlikely that they can compete with the combined force of the member lodges. In time, as non-member resorts gain more confidence in the Association, it is hoped that more and more lodges will join forces with member resorts to promote British Columbia's freshwater resorts.

Other Recreational Activities

Other recreational activities, such as guest ranches, golf vacations, skiing, and adventure packages, can also act as competition to freshwater fishing. Sector associations recently formed to handle these activities are becoming more aggressive and focused. This is one of the reasons why it is so important for the freshwater sector to work together to promote the benefits of a fishing resort experience to the general public.

Lack of Fishing Expertise

Lack of technical knowledge will bar some families, especially those with children, from the fishing resort experience. One of the major inhibitors to consumption of any activity is fear of embarassment. An increasing number of children and their parents are growing up in urban environments and may not have been exposed to the activity of fishing. In order to expand the market, resorts can offer fishing lessons as well as alternative recreational activities to attract the whole family.

4. STRATEGIC GOALS AND BENEFITS

Plan Implementation

The marketing plan presented in this report is submitted as a realistic vision based on the potential growth in revenues that the freshwater fishing sector could support over the next three years. As is shown in Section E., significantly more resources are being spent on collectively marketing this sector than is appreciated. The plan does not, therefore, require significant increases in the amount of resources allocated to this sector, but significant changes in the way that marketing activities are planned, co-ordinated and implemented. The consultants have provided a number of recommendations that will need to be debated by a number of agencies. It is recommended that the document not be used as a blueprint, but rather as a guide or foundation on which the Association and the Ministry can base plans in subsequent years.

Objectives

The plan presented in this report is designed to accomplish the following objectives over a three year period:

1. Increase the number of guests to British Columbia's freshwater fishing resorts and lodges by 30%. This represents an additional 50,000 consumers.

2. Increase the average per diem room rate per person from $38 to $45 in 1988 dollars (ie. if inflation continues at 5% per annum, this would mean the average room rate in 1993 dollars should reach $52 to reach this target and stay ahead of inflation).

3. Increase the length of stay from 4.2 nights to 5.0 nights

4. Increase membership in the Association from 75 members in 1989 to 125 members in 1993 and double membership revenues from $13,000 to $26,000.

5. Increase the number of licences purchased from 390,000 to 451,000 by 1993-- an average annual increase of 5%. (The revenue from such an increase could total $1.3 million and more than cover the cost of any marketing programs designed to make residents and visitors more aware of the fishing resource.)

6. Increase annual capital expenditures spent by resort operators from $10 million in 1988 to $13 million by 1993. In order to achieve a higher room rate, the resort industry as a whole must offer improved amenities and value added services.

Benefits and Beneficiaries

If the strategic goals outlined above were achieved over the next three years, there would be multiple benefits to the resort sector, the provincial economy and the government.

The combined effect of increasing the number of customers, their length of stay and expenditures as outlined above, would generate additional revenues of $19.5 million to the resort operators by 1993.

On the assumption that the 50,000 new resort customers spend 5 nights at a resort and incur taxable expenditures of $75 per person per day for lodging, restaurant meals and retail purchases which are taxed at 6% sales tax, then the additional sales tax revenue would total $1.13 million.

Furthermore, if the number of licences purchased increases by 61,000 (see objective # 5 above), the revenue increase to the government would total $1.3 million.

In conclusion, the government stands to benefit from increased taxation revenues of at least $2.5 million dollars if the marketing plan contained in this report is implemented successfully.

C. COLLECTIVE MARKETING PLAN

1. TARGET MARKETS

Based on the market research outlined in the Situation Analysis, four primary market segments have been identified based on origin and motivation:

1. British Columbians Oriented To the Outdoors With Family and Friends;
2. British Columbians Primarily Interested in Fishing;
3. Non-Residents (primarily from Alberta and the Western Region of the United States) Oriented To the Outdoors With Family and Friends; and
4. Non-Residents Primarily Interested in Fishing.

The absolute and relative volume of each market segment has been estimated based on results of the telephone survey. The research suggests that approximately 60% of the resident market falls into the family/outdoors category, compared to 40% of the non-resident group. The split between resident and non-resident was derived from the Phase One research. These are first and relatively crude attempts at assessing the size of each market segment and need to be updated and revised as the marketing plan progresses.

Exhibit 4

Fishing Resort Market Segments

	Family/Outdoors	**Fishing**	**TOTAL**
Resident	34,000	18,000	52,000
Non-resident	31,000	47,000	78,000
	65,000	**65,000**	**130,000**

Source: Estimates made by the Tourism Research Group

Target 1. Resident: Family-Oriented Market

This is the segment of the resident market that the resort product, as it currently exists, appears to be attracting. User surveys indicate that these residents want an accessible and affordable resort experience in high quality natural surroundings where there are opportunities for recreation and family togetherness. The majority of this market is likely to be middle income families and couples of a wide variety of ages who drive to the resort by car.

The potential for this resident market is confirmed by the findings of the British Columbia Resident Survey conducted in 1985. That research found that most British Columbians would consider travelling in B.C. for a short three day trip, but the province lost its appeal as the trip length increased. Most domestic trips are made by car, are relatively short in duration, and do not cover long distances. British Columbia's appeal to this market is a function of the province's natural beauty, the fact that it's close to home and good for camping, fishing, and outdoor activities. While, on average, half of all domestic travellers said they went lake or stream fishing while travelling in British Columbia, freshwater fishing was most likely to be undertaken by couples resident in medium-sized towns throughout the Province, in blue collar occupations and earning low to middle personal incomes.

In order to build on the existing market and attract more budget conscious families to try the resort experience, the challenge facing the B.C. Fishing Resorts and Outfitters Association will be to:

- entice and inform;
- position the product as accessible and affordable (just a short drive away);
- offer family fun and togetherness;
- stress the hospitality of the hosts;
- stress the healthy environment, the opportuntity for renewal; and
- package new products - Kid's Camps, Family Fishing Schools, etc..

The primary target markets are likely to be located in family, suburban areas and smaller towns. Since many of these customers will include grandparents, a more focused approach to the senior market may well prove fruitful.

There is also the potential to attract a more affluent, urban market of families in which both parents are working, and where there is greater disposable income but less disposable time. This market will be more demanding in terms of amenities and accommodations, but will also be looking for brief vacations that afford an opportunity for "escape", renewal and family togetherness. This market is more likely to respond to images that stress:

- unique, unusual adventures (i.e., make it different);
- getting away from urban pressures, country retreats;
- pampered, all inclusive services --"we do it all for you"; and
- convenience - the rustic "club Med" approach.

It is important to note that relatively few B.C.F.R.O.A. members have product suited to this market at present and, therefore, capital investment will be needed in order to upgrade the product.

Target 2. Resident: Fishing-Oriented Market

This market is more clearly defined in that the majority already fish and have purchased fresh water fishing licences in the past. The survey of licence holders suggested that one in three licence holders prefers to "stay at a lodge where they can concentrate on fishing". They number approximately 100,000 people. A further 29% of the domestic licence holders have not stayed at a lodge but would consider doing so in the future. This group numbers 85,000. **Thus, the total potential market of enthusiastic anglers who might be persuaded to stay at a B.C. resort numbers approximately 185,000.**

This target market differs from the first in that its members value both the lodge's amenities and services as well as the quality, size and species of fish as more important. They are also willing to pay a higher price for the resort, providing their expectations are met. They consider that British Columbia offers a very high quality resource but need to be persuaded to include a resort stay as part of their enjoyment. Many members of this market are keen anglers interested in specialty species such as rainbow trout, steelhead, etc.. Some will be enthusiastic fly-fishermen; others will want to compete for trophy fish.

Compared to Target 1, this market can be accessed via more direct means, such as advertising and articles in specialty magazines, direct mail, promotions with tackle and clothing manufacturers and retail outlets, sportsmen shows and the use of fishing celebrities, etc.. The capacity available to service this market is limited. Many of the sucessful "fly-in" facilities and resorts located on popular steelhead rivers are already fully booked early in the season. In order to exploit the potential of Target 2, the industry will require further investment for upgrading and/or constructing new resorts located in superior fishing areas.

Target 3. Non-Resident: Family Outdoors-Oriented Market

This target market is likely to be similar to Target 1 in terms of motivation, preferences and expectations. Their average length of stay at a resort is also likely to be higher as they will have come from further afield and the resort stay will more likely be part of a vacation, rather than a "get away break". The further away this market comes from, the greater the competition from "intervening opportunities". The primary non-resident markets will be derived from the following:

1. **Western U.S.A.** According to the National Sporting Goods Survey of American Recreation Patterns in 1987, approximately 5.4 million residents of Washington, Oregon and California fish in a lake or stream at least twice a year and could conceivably be interested in a vacation at a freshwater resort in British Columbia. Residents of this region spend $1.6 billion on fishing in their own state, of which $700 million is spent on food and lodging while engaging in this recreational activity. Since their out-of-state fishing related expenditures are in addition to these totals, it is clearly a large and lucrative market.

   Relatively short "get away" packages targetted at Seattle and Spokane are likely to bring greatest results out of the northern part of this region. Many Californians who are headed for Alaska or a longer tour of the Pacific Northwest need to be informed of the fishing resort opportunities. In all three states, there is a need to stress the quality, unpolluted and uncrowded natural environment and the opportunties for family togetherness and fun in safe, comfortable and hospitable surroundings. Americans already perceive Canadians to be particularly warm, friendly and hospitable, so the role of the host should figure prominently in images directed at this market.

2. **Alberta** While Albertans account for 9% of the licence market, they are a less important source of business for the B.C. fishing resort sector as only 16% had used commercial accommodation as part of their fishing experience. The research suggests that most anglers from Alberta will be camping or staying with friends and relatives. They are price sensitive but rate the size and volume of catch as important. A larger proportion are interested in a recreational experience with family and friends than are visitors from Washington. Marketing efforts should be focused more on northern Alberta and Edmonton, rather than Calgary and Lethbridge. Southern Albertans could be attracted to the fishing resort opportunities in Montana.

Target 4. Non-Resident: Fishing-Oriented Market

According to the National Sporting Goods Survey of American Recreation Patterns in 1987, approximately 1.3 million residents of Washington, Oregon and California combined, fish in lakes and streams more than twenty times a year and could conceivably be classified as enthusiasts. Across the whole country, these frequent participants in freshwater fishing number 13 million.

Those enthusiasts who could be attracted to British Columbia are most interested in steelhead, fly-fishing, or competitive trophy fishing. While many have positive perceptions regarding the quality of our fishery, this knowledge and awareness should not be taken for granted, but reinforced with the message that British Columbia offers some of the best lake and stream fishing in the world. Specialty magazines, special promotions with tackle manufacturer's and retailers, direct mail to clubs and large corporations, videos distributed via cable networks, and attendance and aggressive promotions at sportsmen shows are all viable media for reaching this audience.

While this market is potentially international in scope -- British Columbia's product is recognized throughout the world-- it will only be realistic to develop carefully focused campaigns via the specialty media in the Western U.S., the Mountain Region (Wyoming, Utah, Colorado), Eastern Canada and the Eastern Seaboard for the next few years.

The telephone survey results of Washington residents suggests that this market is more inclined to stay at a B.C. lodge or a resort than their Alberta counterparts, and is more interested in the quality of fishing than the availability of alternative fishing activities.

The selection of a resort is directly related to the species of fish available - two out of every three Washington licence holders rated fish species as important, compared to only 30% of the B.C. resident licence holders.

2. MARKETING FRAMEWORK

Approach

The potential growth and strengthening of this sector justify an aggressive and targetted marketing approach on three levels:

a.) Umbrella marketing by the sector Association on behalf of all members equally in order to:

- position the product against target markets;
- build imagery and interest;
- greatly expand awareness;
- offer a centralized system of fulfillment;
- distribute promotional materials;
- represent industry members at trade shows, etc.; and
- co-ordinate the development of a classification system and directory program

by:

- media advertising;
- direct marketing;
- promotions;
- a direct sales system;
- research, analysis and program evaluation;
- public relations.

b.) Site specific marketing by individual members.
While this activity will be undertaken competitively with other resorts in many instances, its effectiveness can be enhanced if undertaken within a set of guidelines provided by the Association and if it is consistent with the umbrella marketing strategy. Individual operators will use such promotional tools as:

- brochure production and distribution;
- direct mail campaigns to existing guests;
- participation in directories and advertising supplements;
- participation in trade shows;
- assistance with fam trips and video productions.

c.) **Regional Marketing by Regional Tourism Associations**

The function of the regional tourism associations is to persuade visitors to visit a regional destination. In order to do this, they must present an attractive mix of products and services to prospective consumers. Since fishing is a strong product in some regions, several of the regional associations will want to promote fishing in their region.

3. COMMUNICATIONS OBJECTIVES

The marketing strategy which follows is designed to accomplish the following five communication objectives:

1. ***Create awareness of British Columbia as the best place to go freshwater fishing in the world***

2. ***Create awareness of the diversity and number of freshwater fishing experiences offered by the resorts in British Columbia***

3. ***Create awareness of the unspoiled, uncrowded scenic beauty and pristine natural environnment***

4. ***Create an awareness that the British Columbia resort experience is affordable-- there's a product suitable for everyone's pocket book.***

5. ***Create a perception among target groups that British Columbia's fishing resorts offer great food and hospitality, friendly services and good times.***

4. POSITIONING STATEMENT

The positioning statement which should drive all marketing of freshwater fishing is recommended to be the following:

> ***British Columbia should be aggressively positioned as the best place to go freshwater fishing in the world.***
>
> ***Both the destination and the resorts offer a premium quality product that is diverse, accessible, and affordable.***

5. STRATEGIC OBJECTIVES AND TACTICS

The marketing program is based on seven strategic objectives and 24 tactics which are summarized as follows:

Strategic Objective # 1

To increase consumer awareness of the fishing resorts of British Columbia as desireable vacation destinations.

Tactics

1.1 Develop and implement a consumer advertising campaign designed to reach the family-oriented market (Targets 1 & 2) identified in the situation analysis.

1.2 Develop and implement a consumer advertising campaign designed to reach the fishing enthusiast market (Targets 2 & 4).

1.3 Plan, develop and implement production of a Freshwater Fishing Directory as fulfillment against generated inquiries.

1.4 Participate in major consumer travel/sportsmen shows in a creative and proactive manner.

1.5 Develop and distribute a video for use at consumer travel shows and as fulfillment by individual operators.

1.6 Develop and implement a Media Publicity Campaign.

Strategic Objective # 2

To increase the sales revenue of British Columbia's fishing resorts from $21 million in 1988 to $41 million by 1993.

Tactics

2.1 Make effective utilization of Tourism British Columbia's 1-800 toll free information line and fulfillment service to follow up inquiries.

2.2 Develop a central sales mechanism to facilitate reservations and to take a proactive, collective approach to generating sales.

2.3 Upgrade the marketing and merchandizing abilities of individual operators through seminars and educational publications.

2.4 Undertake proactive direct sales campaign via mail to selected target audiences (fishing clubs, magazine readers, tackle purchasers and travel/sports writers) who specialize in this sector.

Strategic Objective # 3

To identify and develop new products and programs that would appeal to new markets for the freshwater resort sector.

Tactics

3.1 Develop and test market a "Learn to Fish" and "Kids Kamp" program aimed at attracting new consumers to the fishing resort experience.

3.2 Develop and test market some Fishing Clinic programs aimed at the fishing enthusiast market and designed to increase both resort stays and per diem expenditures through innovative, value-added programming.

3.3 Upgrade the packaging and programming abilities of individual operators through seminars and educational publications.

Strategic Objective # 4

To increase Travel Trade use of the British Columbia resort product by positioning it as a potential revenue opportunity.

Tactics

4.1 Develop a manual/catalogue of those freshwater fishing resort packages which would be suitable for long-haul and convention markets.

4.2 Undertake a direct mail campaign to distribute the manual to top producers in long-haul markets.

4.3 Maximize media exposure in trade publications through regular news releases and feature articles.

Strategic Objective # 5

To develop an on-going mechanism for evaluating marketing effectiveness, operational performance and customer satisfaction.

Tactics

5.1 Create simple, easy to use survey instruments for use by resort operators to record market profiles and operational statistics.

5.2 Conduct awareness and conversion studies every 2 years to determine marketing effectiveness.

Strategic Objective # 6

To increase awareness of B.C. resorts among corporation and association meeting programmers and stimulate the use of selected fishing resorts for small meetings and incentive travel bonuses.

Tactic

6.1 Develop a manual/brochure of those freshwater fishing resort packages suitable for the corporate and incentive markets.

6.2 Distribute the manual to ground handlers, inbound incentive specialists, convention facilities sales staff and selected meeting planners.

Strategic Objective # 7

To streamline and strengthen the organizational structures necessary to produce maximum yield on the investment of marketing dollars.

Tactics

7.1 Produce a business plan, new logo, and organizational structure for the B.C.F.R.O.A.

7.2 Identify an acceptable funding mechanism that generates maximum accountability (ie. revenue to be related to performance).

7.3 Clarify the roles, responsibilities and reporting relationships that exist between government, industry associations, communities and individual operators.

6. TACTICS

Tactic 1.1 **Develop and implement a consumer advertising campaign designed primarily to reach the family-oriented market.**

Rationale The target market (middle income families located in urban centres of Greater Vancouver, Victoria, Prince George, Edmonton, Calgary, Spokane, Seattle and Bellingham) needs enticement and information regarding the array of vacation opportunities offered by British Columbia's freshwater fishing resorts.

Medium Message Placement

a) An annual supplement/flyer version of the B.C. Freshwater Fishing Guide should be inserted in major **daily** newspapers in Greater Vancouver, Victoria, Prince George, Edmonton, Calgary, Spokane, Seattle and Bellingham in late April. The flyer should be newspaper format and 4 - 6 pages. The flyer would contain advertorial on the benefits of a resort vacation, the diversity of species, an introduction to the regions and a provincial and regional map which relates to the directory of resort listings. The Call to Action would combine an invitation either to write for the full colour directory of resort vacations or to call a toll free line to a fulfillment house/reservations centre capable of sending brochures on specific properties and/or handling booking requests.

In order to maintain equity between properties, individual suppliers would not be permitted to advertise in the flyer, but could purchase ad space in the same issue of the newspaper in which the ad supplement was inserted.

Additional advertising revenue to support the flyer would be solicited from other beneficiaries: domestic airlines, rental car companies, gas stations, tackle manufacturers, restaurant chains, outdoor clothing retailers, etc.

b) 1 - 3 newspaper ad layouts for insertion in weekly community newspapers twice a year. The ads would be generic in context and encourage readers to call a toll free line to get the B.C. Freshwater Fishing Guide. Copy would relate to family fun in natural surroundings of scenic beauty, hospitality and affordability. The placement schedule would be made available to all B.C.F.R.O.A. members so they could place operation-specific ads if they wished. Wherever possible, the ads would be supplemented with articles and reviews of B.C. Fishing Resorts in the Travel Section.

Tactic 1.2 **Develop and implement a consumer advertising campaign designed to reach the fishing enthusiast.**

Rationale According to the survey research, this market has a high awareness of, and appreciation for, the fishing resource, but lacks an awareness of the vacation opportunities offered by the resorts. Since their resort selection criteria are different than the family market, a separate campaign that places greater emphasis on the fishing is recommended.

The strategy behind selecting and advertising in specialty/targeted magazines is twofold:

- to increase consumer awareness of the fishing resorts of British Columbia; and
- to use the advertising buy as leverage to get a feature editorial story on freshwater fishing in British Columbia.

Given the limitations available to creatively tell the B.C. freshwater fishing story within a one page or 1/2 page advertisement, it is important to use the ad space to provide an avenue for additional information which will help make the sale (i.e., a generic sell of B.C. fishing, plus call to action via a 1-800 number and access to the directory or supplement).

More important, however, is the need to use a commitment to ad purchase as a means of building a positive P.R. relationship with the magazine and achieving at least one feature editorial per magazine, per year. If the editorial is not obtained as part of the price of the ad, then the value of the magazine is significantly diminished. British Columbia has leverage for editorial, especially if a free fam tour for the magazine or writer is provided. The importance of establishing a positive relationship with the editors of the magazine cannot be underestimated. Press releases should be mailed out regularly along with new resort videos and brochures, and feature stories written by the travel writer hired by the Association.

Medium Message

Three ad layouts are recommended for insertion in selected fishing and outdoors-oriented magazines aimed at fishing enthusiasts located in British Columbia, Alberta, Washington, Oregon, California and selected mountain states. The imagery and copy should focus on the quality of fishing plus the quality of resort amenities to be found in British Columbia.

In light of the cost of such ads, the majority will be half page or 1/4 page in size. The copy should relate to British Columbia's scenic beauty, the challenge of the species, the size and number of the catch and the resort amenities.

One ad should feature Steelhead and focus on B.C. as the place for this type of experience; another ad should feature B.C. as the rainbow capital of North America; and the third should feature the natural setting and diversity of fishing opportunity.

Placement and Cost

An annual budget of $70,000 - $75,000 is recommended for this tactic. A variety of specialty magazines were reviewed in terms of their circulation, expense and suitability, and the following placement program recommended:

1. Regional specialty publications such as *B.C. Outdoors and B.C. Sportsfishing* magazine should be the first priority for any advertising/editorial and approximately $20,000 allocated to these publications. Their combined circulation is approximately 54,000.

2. *Fly Fisherman* has a circulation of 145,000 American readers, of which 45% are based on the West Coast. It has already published several feature articles on the British Columbia freshwater fishing product and appeals to the fishing enthusiast. One full-page, four-colour ad placed 3 times a year would cost $18,000.

3. *California Angler* is a monthly, glossy publication that covers both fresh and saltwater fishing. Advertising in this publication is recommended if a major feature can be negotiated. Last December, the magazine featured British Columbia. A full-page, four colour ad should be placed three times leading into the fishing season and individual operators, with product suitable for a more demanding clientele, should be encouraged to take out classified ads at the same time.

4. *Fishing World* is one of America's leading magazines for serious sport fishermen and is published bi-monthly. Editorial is totally directed to the sport of fishing, with an emphasis on how and where to fish, and written for the dedicated angler. While the total circulation exceeds 300,000 copies, ads can be placed in regional editions at relatively low cost. A one-page, four colour ad placed 3 times per year in two regions would cost $12,000.

Tactic 1.3 **Plan, develop and implement production of a Freshwater Fishing Directory as fulfillment against generated inquiries.**

Background

The Association, in cooperation with the Ministry of Tourism and Provincial Secretary, published its first Freshwater Fishing Guide in 1989. This brochure is the primary fulfillment piece for the freshwater resort sector as a whole. It contains appropriate "lure" messages with accompanying photography and the listings of the various resorts, by a good range of different categories (geographic, type of accommodation and to some degree species).

The publication is privately handled by *BC Sport Fishing Magazine* and, as such, relies on "selling" advertising space to member resorts with matching grants by the Ministry. As a consequence, it tends to give added weight to those who can afford or choose to advertise more than others and results in a variety of advertising styles, formats and messages that distract the reader. While an excellent first start, a number of changes are recommended.

Recommendations

The Directory should be an official publication of the Association that is designed to entice and inform the consumer regarding fishing resort vaction opportunities. Instead of purchasing an advertisement and supplying camera ready art, each member would receive an attractive, comprehensive and professionally designed four colour listing.

Full colour listings will add to overall cost, but produce much better product. The size of a members listing should be related to price of the product and the quality and number of amenities. The cost of each listing would range from $300 for a 1/4 page listing to $800 for a 1/2 page listing. The Association would specify which material should be included and would supervise consistent use of terminology to enable the consumer to make an informed decision.

The publication should be produced under contract by an external publisher to produce the guide on a cost plus basis.

Advertising could be sold to large suppliers of fishing tackle, equipment and clothing as a means of reducing costs.

Circulation of the Directory should be increased substantially from its present 65,000 copies to over 250,000. It should be distributed as follows:

- at sites where fishing licences are sold
- as fulfillment for advertising generated inquiries
- via travel shows
- for direct mail to selected travel agents and wholesalers

The Freshwater Fishing Regulations should be reduced in length by eliminating regional resort information and supplier advertising. The Regulations should be paid for by the Ministry of Environment, Recreational Fisheries Branch. It is not considered appropriate to use this publication as a promotional piece for the resort sector.

The content of the Directory should be structured as follows:

Section 1. Inside the front cover, there should be an introduction, a simplified provincial map that shows the regions and major highways, and a table of contents. (2 pages)

Section 2. A general lure image section that combines copy and quality illustrations to promote British Columbia as the place to enjoy freshwater fishing. It should highlight the diversity of experiences and geographical settings. It should promote the resort or lodge as providing the best oppportunity for enjoying this recreational activity. (2 pages)

Section 3. A section on Product. This section should comprise a number of articles with supporting graphics and photos that demonstrate the variety of ways that consumers can enjoy the fishing product. It could potentially include such topics as:

- *How to Fish*
- *Family Fun*
- *Drive-in Resorts* (i.e., show how accessible some resorts are to the urban centres of Vancouver)
- *Fly-in resorts*
- *The Steelhead Experience*
- *Rainbow Opportunities*
- *Guides - how and why to use one*
- *Specialty Camps*
- *Kids camps*
- *Fish 'N Tour* (i.e., show some touring routes, especially the route to Alaska, and some fishing resort opportunities located nearby).

Specialty products will be linked to a symbol or classification (i.e., plane for fly-in, car for drive in, A for near Alaska highway, etc.). Resorts in each category will be given appropriate symbols in the listing section below.

Section 4. The listing section should ideally be placed at the centre of the publication. Each listing should comprise a name, number, photo of the resort, description of facilities and amenities, appropriate product symbols and, most importantly, a map reference number. Readers browsing through the listing section could then locate a resort of interest with relative ease. By scanning through the listings, the product symbols will enable the reader to quickly qualify a resort.

Section 5. A regional section would conclude the publication. Each sub section would describe the unique features of the region from a fishing perspective and combine copy and illustrations with a map of the region. The resorts' location on the map would be shown using its locator number and symbols. A consumer interested in steelheading in the North by Northwest region could, therefore, glance at the map and see instantly which resorts in that area specialized in steelhead, fly-in fishing. A consumer interested in travelling the Yellowhead Highway with a family and R.V. could easily find those resorts located near the highway that offered R.V. sites and were family-oriented.

These regional sections could also be used by the regional tourism associations in their regional "lure" brochures. The purpose of which is first to present the region as an attractive destination and to show the diversity of products and experiences. The cost of preparing the copy for the guide can then be amortized over two publications.

Tactic 1.4 Participate in Major Consumer Travel/Sportsmen Shows

Rationale In order to counteract low levels of consumer awareness regarding the Freshwater Resorts, there is a need to take an aggressive stance at selected travel and sportsmen shows. The majority of industry participants represent the saltwater product exclusively and, unless sufficient freshwater operators are able to develop products capable of generating the high per diem rates associated with saltwater resorts, this trend will and should continue. It is simply not cost effective for most freshwater operators to attend such shows as the sale of their product cannot yield sufficient returns to cover the marketing expense.

In the past, operators have occasionally "rotated" and one operator has attempted to sell more than one resort as a means of sharing expenses, but most operators are unprepared to entrust to a percieved "competitor" the task of selling their own property.

New Approach

A marketing co-ordinator should be retained to supervise and co-ordinate all collective marketing programs that relate to the marketing of freshwater fishing resorts in British Columbia.

A trade show booth for British Columbia's Freshwater Fishery should be designed and selected shows in key markets should be attended by the Marketing Co-ordinator. The primary shows worth attending are listed in Appendix A.

In addition to distributing brochures and rate sheets for Association members, the Marketing Co-ordinator should be able to take bookings and receive deposits on behalf of Association members. A simple computerized data base of member's products could be established at low cost and set up at the booth.

The task of the Marketing Co-ordinator is to stimulate interest in B.C.'s freshwater fishing vacation opportunities and facilitate sales. It is a specifically merchandising function that neither the Ministry's personnel nor regional tourism managers are mandated to perform.

The Marketing Co-ordinator should attempt to maximize publicity in local media prior to and during the show event through the provision of press releases, participation on talk shows and joint promotions with tackle companies and fishing celebrities.

The booth should be equipped with a TV screen so that video's of the product can be shown.

At the show site, trained speakers should be used to make presentations on topics of interest to show audiences. Of equal importance is the need for a "closing area" on the show floor where operators can "close deals" with interested purchasers.

In addition to attending shows at the centres listed above in Appendix A, participating operators and the Marketing Co-ordinator are encouraged to take the extra time to visit smaller communities and organize special presentations at a local hotel. Members of fishing and outdoor clubs, R.V. owners, members of service associations and automobile clubs, and corporate representatives could be invited to attend a "Fish British Columbia" evening in which vacation opportunities at B.C. resorts are highlighted.

Tactic 1.5 **Develop and Distribute a Video for use at Travel Shows and for use by Individual Operators.**

Rationale The generation of video images is becoming a more frequent mechanism for selling vacation products and, in light of the super quality of British Columbia's resource, "seeing means believing". On the downside, videos can be expensive to produce and only justified if a) they receive widespread distribution and b) their cost is spread among several sponsors. Through the creative editing of existing material, combined with the addition of "fresh footage", a series of complementary videos should be produced which present the different features of the fishing resort experience in British Columbia.

Format Each promotional video for the Freshwater Fishing Product would last 8 - 10 minutes and be comprised of two elements. First, a core generic piece (8 minutes) that sells British Columbia as a destination, and a stay at a resort as a unique, enjoyable experience. It will feature the spectacular scenery and the warm hospitality and special skills of the resort owner and guide/outfitter. The second briefer component will be a two minute feature of a particular resort paid for exclusively by the individual operation.

Distribution

The videos can be used at trade shows, for Cable TV presentation and for features on fish-related TV programming. Individual operators can sell or rent them as information/fulfillment pieces. They can be offered at a subsidized price to those wholesalers and top producing

retailers who request copies for showing to clients.

The video can also be rented out or sold for display in tackle/outdoor clothing retailers.

Sponsors The costs of producing such videos could be shared among the following agencies:

- Tourism British Columbia
- International Marketing Component of the ERDA Tourism Agreement
- Commercial Sponsors including equipment manufacturers such as Daiwa and Mercury Outboard or airlines
- Ministry of Environment - if the video included a section on "catch and release" and resource management.
- Individual operators: those operators who chose to have a two minute "clip on" regarding their specific property should pay entirely for the "clip on" plus a fixed fee for the use of the generic portion.

Tactic 1.6 Develop and Implement a Media Publicity Campaign.

Rationale In view of the power of word of mouth advertising and the need to build awareness, obtaining "free" media publicity through articles and news stories can be a cost effective marketing tool.

Approach

1. The services of one or several professional writers should be retained to write a series of articles (up to 10) on different features of the B.C. freshwater fishery for distribution to community newspapers and travel magazines in selected primary markets. Their content should be oriented to the family market and reinforce the positioning statements of diversity, affordability, family fun and togetherness, etc.. The same writer could prepare the copy for those ads and portions of the directory which are oriented to the same market. All articles should mention an address or phone number of the Association so interested readers can follow through.

2. One or several well known fishing celebrities should be commissioned to write a series of articles aimed at fishing enthusiasts which could be distributed to specialty magazines. All articles should also state how readers can obtain more product specific information.

3. A brief marketing-oriented newsletter should be produced which updates operators on the specifics of fishing resort marketing activities, such as ad placement dates, special promotions, and participation in trade shows which can be circulated among the following:

- regional tourism associations;
- Tourism B.C. offices in the US;
- top producing and interested retailers and wholesalers;
- Association members;
- relevant government ministries (Tourism,Environment, Forestry, Parks);
- External Affairs offices in primary U.S. and overseas markets (U.K., West Germany, Japan, Australia); and
- selected media.

Tactic 2.1 **Make effective utilization of Tourism British Columbia's 1-800 toll free information line and fulfillment service to follow up inquiries.**

Rationale The call to action on all consumer advertising, except the annual newspaper supplement, should be the Ministry's 1-800 number so that inquirers can be sent the Freshwater Fishing Guide as promptly as possible.

Since there is little point in generating inquiries if operators do not follow up leads and make a sale, we strongly recommend that the Ministry provide the Association with monthly reports containing:

1. Names and addresses of inquirers who specifically wanted freshwater fishing resort information.

2. A summary of inquiries tabulated by origin, media and month.

Such a list could then be made available to Association members for follow-up. **We do not see this approach as constituting a breach of privacy. The caller is clearly wanting and needing information on which to base his decision.** The response to this need has to be immediate and comprehensive if British Columbia's product is to compete with other destinations. The lead time between inclination to travel and departure is narrowing every year.

Tactic 2.2 **Develop a central sales mechanism to facilitate reservations and to take a proactive, collective approach to generating sales.**

Rationale

As the lead time between inclination to travel to a destination and actual purchase of a specific travel product narrows, there must be a shift in marketing emphasis from generic awareness building to effective product merchandizing.

The government's role is to create generic awareness of a destination and it has neither the mandate nor the right to market specific properties. Use of the 1-800 fulfillment service is an excellent way of disseminating information in response to inquiries, but it cannot make a sale.

While individual operators are responsible for selling their property, they too are hampered in many ways. The cost of finding "hot prospects" within huge markets spread over large distances is excessively expensive and they must, therefore, rely on the generic umbrella campaign to appeal to and capture the attention of the potential consumer. In the case of the fishing resort sector, there is one further obstacle. The remoteness of many resorts means poor communications. Credit card deposits cannot be taken over the telephone. Clearly some form of collective sales mechanism is desireable, not to replace operator's individual sales efforts, but to supplement them.

Recommendation

The Association should operate a B.C. Hotline and Reservation system for its members. If the Province ever developed a province wide reservations system, it should be integrated with it. But in the meantime, the Association could develop a relatively simple system for its members at relatively low cost.

The B.C. Fish Hotline number would be provided in all fulfillment material as an alternative and supplement to the operator's numbers. Consumers could still be encouraged to call their preferred resort directly, but in case connections were difficult they could be assured of either getting information or making a reservation via the hotline service.

The hotline should be operated by the Association on behalf of its members. While they may choose to sub contract out the function to a third party, the Association's members must be assured of the system's fairness and all concerns regarding bias addressed. The system must be market driven, ie. every attempt made to determine the wants and needs of the consumer and then match suitable products to that market demand. As addressed under Tactic 1.4, the Hotline/Reservations Function can be "transported" to Consumer shows as a means of increasing sales.

Tactic 2.3 **Upgrade the marketing and merchandizing abilities of individual operators through seminars and educational publications.**

Rationale The strength of the collective marketing campaign is directly related to the ability of individual operators to sell their properties and service to the consumer effectively.

Recommendation

At least 3 marketing seminars should be organized for members of the B.C.F.R.O.A. on the following topics:

1. **An Introduction to Marketing:** this seminar would take participants through the operator's manual.

2. **Advertising Techniques:** this seminar would cover the basics of designing, writing and placing print advertisements.

3. **Maximizing Publicity:** this seminar would show resort operators how to get maximum media exposure at least cost, and how to put on special events and promotions for target markets.

Assistance with the design, development and delivery for such courses could be obtained from the local community colleges, the Pacific Rim Institute of Tourism and possibly via the F.B.D.B. Case Counsellors.

Tactic 2.4 **Undertake a proactive direct sales campaign via mail to selected target audiences (fishing clubs, fishing magazine readers, tackle purchasers and travel/sports writers) who specialize in this sector.**

Rationale The fishing enthusiast is a relatively easy consumer to identify and access: they purchase licences, read specialty magazines, purchase tackle, etc.. The survey research suggests that this market valued the fishing resource highly, but were not as inclined to stay in a resort. They are less price sensitive than the family-oriented market and demand high quality services and amenities.

Recommendation

Those members whose product matches the more discerning fishing enthusiast market should be approached and an inventory of 10 - 20 suitable fishing packages should be compiled.

The master list of licence holders should be analysed according to zip code and a sample of 5000 names and addresses of potential consumers located in affluent households in primary geographical markets should be polled.

These potential consumers should be contacted by mail and offered a special incentive to purchase one of the fishing packages.

A co-op sponsor should be approached to share the cost of the promotion.

Tactic 3.1 **Develop and test market a "Learn to Fish" and "Kids Kamp" program aimed at attracting new consumers to the fishing resort experience.**

Rationale

As Canada's population becomes increasingly confined to large urban centres, many children and their parents have not been exposed to outdoor activities in a natural setting (i.e., rowing a boat, chopping wood, setting bait, fishing, etc.). One major obstacle to consumption of any product or service that involves participation is fear of making a fool of oneself. The consultants believe there to be a market of families, especially fathers and sons, who could be attracted to the fishing resort experience in a non-threatening attractive way and suggest that certain resorts be approached to participate in a "Learn to Fish " or "Kids Kamp" program.

Recommendation

A major sponsor, such as Safeway, MacDonalds or 7-11 Stores, should be approached to promote a week of learn to fish at Kids Kamps for kids aged 9-16 years and Family Fish Camps, where parents (with a focus on Dads and Gran Dads) could also be invited along and the promotion could take place around Fathers day. If it were neither possible nor practical to hold the fish camps all in one week, then we recommend consideration of a roving clinic promotion.

A special brochure on the new "Learn to Fish Packages" should be produced and ads inserted in the Vancouver Sun's annual guide for Summer Kids Camps.

Devote one page of the Fishing Guide to the subject of family learning opportunties and Kids Kamps.

The trade show booth and a fishing celebrity could be taken to certain high traffic fishing malls and a special promotion be developed to introduce the family market to the notion of family fun at a fishing resort.

Tactic 3.2 **Develop and test market some Fishing Clinic programs aimed at the fishing enthusiast market and designed to increase both resort stays and per diem expenditures through innovative, value-added programming.**

Approach In order to entice the fishing enthusiast market into staying at a resort, some additional programming may be necessary. Since many fishing enthusiasts wish to improve their skills, we recommend the Association identify those members who have a product suitable for the fishing enthusiast market and develop some innovative Fishing Clinic programs. This might involve inviting celebrity anglers/authors to put on seminars, or arranging for lectures on local entymology or fly-tying; fly-fishing enthusiasts may like to have their casting technique videoed and analysed by "pros" in the same way that golfers do.

Tactic 3.3 **Upgrade the packaging and programming abilities of individual operators through seminars and educational publications**

Rationale Even the world's most luxurious and well equipped resorts have learned the importance of providing a variety of programmed activities for their clients. Today's consumer wants to be entertained, wants to be active and is willing to pay extra. The fishing resort experience can be made to yield more profit with innovative and imaginative programming suitable to each target market. For low to medium priced resorts oriented to families, such programming might include the simple addition of a naturalist who can lead the children on nature walks, an entertainer who can lead "sing alongs" around a campfire, etc.. Higher priced resorts that wish to attract couples may combine fishing with haute cuisine and include lessons on preparing and cooking fish and choosing appropriate wines. Other resorts may decide to focus more on wildlife viewing and nature interpretation programs to enhance their guest's enjoyment.

Recommendation

Examples of successful "value-added programs" that are working across Canada should be compiled. A database of potential resources could also be compiled for use by Association members. A seminar on Packaging and Programming should be designed and the two domestic air carriers approached for sponsorship.

Tactic 4.1 **Develop a manual/catalogue of those freshwater fishing resort packages which would be suitable for long-haul and convention markets.**

Rationale Not all B.C. resort product is suitable for the international market. This is due both to a lack of deluxe amenities and services, and an inability to meet the specific needs of larger tour wholesalers. In order to attract more business from the long-haul and corporate markets, it will be neccessary to exercise discrimination and only promote those resorts which can satisfy these markets.

Approach Those freshwater fishing resort operations which have internationally appealing product and which want to cater to this market should be identified.

A catalogue of resorts and packages suitable to this market should be compiled, which contains individual and group rates, commission structures and booking procedures.

A database and profile of those top wholesalers interested in freshwater fishing resorts should be compiled and kept current.

Tactic 4.2 **Undertake a direct mail campaign to distribute the manual to top producers in long-haul markets.**

Rationale The Colorado guest ranch industry has shown that once a product is upgraded and properly priced and sufficient commissions are set so that the travel trade can obtain revenue from a sale, then the relative importance of wholesalers and retailers as a source of business can increase significantly.

Approach Using the database compiled as part of Tactic 4.1, an aggressive direct mail campaign with the top wholesalers and retailers should be undertaken, not only to provide them with information regarding the freshwater fishery resorts, but also to help them market and merchandise the B.C. product. That may include tips on accessing keen anglers in a market area or background information on the Ministry's advertising campaign so that the travel trade can follow-through with promotions of their own.

Tactic 4.3 **Maximize media exposure in trade publications through regular news releases and feature articles.**

Assemble and maintain a detailed data base on travel media and travel writers.

Send articles on a regular basis, in order to stimulate stories.

Organize fam tours for editors of specialty outdoor magazines.

Tactic 5.1 **Create simple, easy to use survey instruments for use by resort operators to record market profiles and operational statistics.**

Rationale An effective and disciplined marketing plan will only succeed if progress can be measured and the effect of various marketing and promotional tactics accurately measured.

Approach All member resorts should be provided with a survey kit which shows them how to survey and count their guests, and how to determine their market profiles and operational performance.

The completed questionnaires should be sent to an independent research firm for compilation and analysis in order to protect the confidentiality of individual properties.

Samples of Guest Survey questionnaires are provided in the Fishing Resort Marketing Manual.

A cost effective way of implementing this tactic might be to negotiate with instructors and students of the B.C.I.T. Tourism and Marketing Management program to take on the task of coding, analysing and interpreting survey results each year.

Monthly publication of such statistics as occupancy, room night revenues, market sources, etc., will enable individual properties to evaluate their progress against that of the industry as a whole. Such information will also enable the government to track the effectiveness of marketing activity in terms of return on investment and will provide the investment/business community with the information necessary to justify investment or loan decisions.

Tactic 5.2 **Conduct awareness and conversion studies every 2 years to determine marketing effectiveness.**

Approach A sample of householders in primary markets should be surveyed every 2 years by the Ministry of Tourism and Provincial Secretary in order to test for awareness of the B.C. freshwater fishing product. In order to reduce costs to the B.C.F.R.O.A., such questions could be included on an omnibus survey that measures awareness of other B.C. vacation products.

A sample of persons requesting the Freshwater Fishing Guide should be surveyed every 2 years to determine the conversion rate and their perceptions of the product.

The results of Ministry directed research on inquiries to the 1-800 line should be made available to the Association on a timely basis.

Tactic 6.1 **Develop a manual/brochure of those freshwater fishing resorts and packages suitable for the corporate and incentive market**

Rationale The corporate market in British Columbia is virtually untapped as far as the freshwater resort product is concerned. The manual should include attractively priced packages of "get away fishing experiences" that would appeal to management and executives in small to mid sized businesses.

Distribute the manual to ground handlers, inbound incentive specialists, convention facilities sales staff and selected meeting planners.

The Association should compile and maintain a database of the ground handlers, and other agencies and interest groups, which handle corporate travel within British Columbia in order to be able to undertake a direct mail campaign. A manual/catalogue of packages similar to the one developed for the long-haul market should be developed for the corporate market and mailed out.

A direct mail campaign should be undertaken at the beginnning and end of the season as a means of extending the season a week or two for participating resorts. By extending the season one additional week and obtaining 60% occupancy, the fishing resorts of B.C. would generate an additional $.75 million in revenue per annum.

The Association should approach the domestic air carriers to determine competitive pricing opportunities and marketing approaches. Frequent flyers of Time Air and Air B.C. could possibly be awarded fishing packages for their frequent flyer points accrued on domestic flights.

7. MARKETING PLAN BUDGET

The marketing plan budget presented below provides an approximate guideline regarding how monies should be allocated between tactics over the next three years. Section E of this report suggests that this budget is actually less than the amount currently spent on collective marketing.

Exhibit 5
Marketing Plan Budget

Tactic	Description	Year 1	Year 2	Year 3
1.1	Consumer Advertising Campaign- Families			
	a. annual supplement in dailies	$60,000.00	$65,000.00	$75,000.00
	b. ads in weeklies	$50,000.00	$50,000.00	$50,000.00
1.2	Ads for Specialty Magazines	$75,000.00	$75,000.00	$75,000.00
1.3	Freshwater Fishing Directory	$75,000.00	$50,000.00	$50,000.00
1.4	Travel Shows			
	Booth design	$7,500.00		
	Annual Attendance at Shows	$50,000.00	$50,000.00	$50,000.00
1.5	Video	$35,000.00	$40,000.00	$40,000.00
1.6	Media Publicity	$15,000.00	$10,000.00	$10,000.00
2.1	Toll-free Information	n/a		
2.2	Central Sales Mechanism	$30,000.00	$5,000.00	$5,000.00
2.3	Seminars to Upgrade Marketing Skills	$7,500.00		
2.4	Direct Mail to Fishing Enthusiasts			$7,500.00
3.1	Learn to Fish and Kids Camp	$20,000.00		$15,000.00
3.2	Fishing Clinic Programs		$20,000.00	
3.3	Seminars to Upgrade Packaging Skills	$7,500.00		
4.1	Catalogue for Long-Haul		$4,000.00	$3,000.00
4.2	Direct Mail for Wholesalers		$2,000.00	$2,000.00
4.3	Publicity in Trade Press		$15,000.00	$15,000.00
5.1	Guest Surveys and Operating Performance	$8,000.00	$5,000.00	
5.2	Awareness and Conversion studies		$25,000.00	
6.1	Manual for Meetings and Incentives		$5,000.00	$2,500.00
	Total	$440,500.00	$421,000.00	$400,000.00

D. PRODUCT DEVELOPMENT

The Sport Fishing Lodge/Resort industry in British Columbia contributes $21 million annually in tourism expenditures to the province. The Phase One study of the industry documented the potential for growth and increased revenue performance through several key strategies:

- increased utilization of the existing physical plant;
- diversification of the product offered by many of our existing lodges/resorts to serve expanding family oriented markets; and
- the introduction of new, high quality lodges and resorts serving international markets.

The marketing strategy presented in Section C established a number of short-term priorities for the industry. Marketing and product development must proceed in parallel, and, therefore, the product development plan presented below is structured to complement the marketing strategy. Specifically, the product development plan priorities have been organized for consistency with the short-term marketing priorities to ensure that product development attention by the Association complements their marketing efforts.

1. PLAN OBJECTIVES

Based upon research undertaken for the Phase One study and the results of the marketing plan, the product development plan has been designed to achieve the following objectives:

1. Utilize existing plant capacity more effectively;
2. Upgrade and diversify the product in order to appeal to a broader range of markets and in order to achieve higher per diem rates;
3. Ensure that there is sufficient operating capital to enable existing operators to upgrade and expand;
4. Attract new capital and develop new facilities, especially to meet the needs of expanding international markets;
5. Create a secure economic and physical environment in which resort operations can thrive and prosper; and
6. Protect and enhance the natural resource base (both scenery and fish stocks, and natural environment in general).

A discussion of the strengths and weaknesses of the British Columbia freshwater fishing sector is presented in the Situation Analysis portion of Section B to this report. The plan is also based on the classification of resorts as presented in Exhibit 1.

2. PRODUCT DEVELOPMENT PLAN COMPONENTS

The recommended components of a product development plan are derived from the issues and concerns raised by both operators and consumers in the Phase One study. These are described under five major headings.

1. ***Product Orientation or Product Market Matching***
   This relates to the degree to which the product responds to consumer expectations and to potential markets which will be targeted through the marketing plan. The major issues to be addressed here include actual definitions of the product in terms of what is being sold; the clearly documented need to upgrade existing facilities; the need to add new facilities to existing operations supporting a family orientation; the need for more extensive and consistent packaging of the sport fishing lodge product; and the movement toward a less complex pricing system to increase consumer certainty.

2. ***Product Philosophy***
   As the industry matures, it is important that it adopt a philosophy and code of ethics which will increase consumer acceptance and provide some certainty to the marketplace about levels of service and hospitality. In addition, a more conservation-oriented approach, adopted as a clear position of the Association, will help in promoting protection of the product with government and the public.

3. ***Capital Access***
   This was identified as a major concern by most operations. Issues here include the availability of appropriate financing programs and the capacity of operators to develop sound and saleable business plans to support financing requests.

4. ***Operations Environment***
An integral part of the product, taxes/licence provisions, land tenure, and operating costs were all identified as major areas of concern which should receive attention in the product development plan. Land tenure, in particular, is an issue given the difficulty of securing financing where the operation is under a crown lease.

5. ***Product Protection***
Identified as a priority by all operations, resource management conflicts and issues can directly affect the viability of an operation and, therefore, should be included in the product development plan. From a British Columbia tourism perspective, the priority is on the world-class product offerings as these contribute to B.C.'s reputation and can have a positive spin-off effect on other freshwater operations. In addition, the international market for world-class products is a high spending market which generates substantial incremental economic impacts for British Columbia.

3. PRODUCT DEVELOPMENT PLAN PRIORITIES

For the purpose of the marketing strategy, industry operations were classified in three categories: highest quality fishing experience, "accessible" wilderness experience, and maintenance and hobby/lifestyle operations. The marketing strategy further identified priority target markets as family and close-in markets. These, therefore, provide the structuring elements to identify priorities for product development for each of the components described above. The recommended priorities are summarized below for each industry class.

1. ***Highest quality fishing experience operations*** - the short term emphasis should be on product protection strategies. This group generally has a well developed product orientation targeted to "enthusiast" market segments. They also have substantial resources to access capital. The main threat from a product standpoint for this industry group is resource degradation through competing land uses, resource conflicts, and loss of the remote, wilderness experience.

2. ***"Accessible" wilderness experience operations*** - the focus here should be on product orientation, capital access initiatives, and securing sound operational environments. This group of operations offers the greatest potential from a market standpoint for the priority target markets identified in the marketing plan (family and close-in markets). The emphasis on diversifying the product to meet the needs and expectations of these target markets matches the recommended short term marketing strategy.

3. ***Maintenance and hobby/lifestyle operations*** - the focus here should be on maintaining a reasonable operating environment and both encouraging and supporting operators to upgrade their facilities, as appropriate, to either of the "accessible" or "highest quality" fishing operation types.

Based on these product development priorities, relative priorities for each product development component are shown in Exhibit 6. A ranking scale of 1 (highest priority for short-term action) to 3 (lowest priority for action in the long-term) is used. In general, most attention should be paid to those product development initiatives which apply to "accessible" operations as the marketing strategy suggests they will provide the greatest short-term opportunity for increasing market share.

In addition to identifying the priority industry classes for each product development component, Exhibit 6 also shows recommended product development initiatives for each component that logically falls within the mandate of the B.C.F.R.O.A. These initiatives are organized into four general areas:

- information services--involving the provision of information and organization of seminars and workshops to members;

- product philosophy/ethics--involving leadership in promoting an appropriate code for members of the Association;

- research--involving support activities in each of the product development component areas (see Exhibit 6), development of more informed positions and directions for product development;

Exhibit 6: Product Development Plan - Priorities and B.C.F.R.O.A. Product Development Initiatives

	PRIORITY FOR PLAN (Based on Marketing Strategy)			PRODUCT DEVELOPMENT INITIATIVES			
Product Development Components (Based on Phase Report, 1988)	**"Highest Quality" Fishing Experiences**	**"Accessible" Experience in Wilderness Setting**	**"Maintenance" or "Hobby" Operations**	**Information Services**	**Product Philosophy/ Ethics**	**Research**	**Issues Management**
1. Product orientation to existing/potential markets (product definition, development, packaging and pricing)	3	1	2	• Manual • Seminars/ Workshops • Feedback to members	–	• Ongoing product/market match monitoring • Develop data base capability • Develop seminar materials	–
2. Product Philosophy (catch and release, wilderness setting, code of ethics)	1	1	1	• Incorporate in marketing/ brochures/ postion papers • Promote to members • Explore joint program with Province	• Develop Code of Ethics	• Test consumer reaction	• Promote approach to Government • Seek recognition in Government programs
3. Capital Access • Existing Operations • New Operations	3 2	1 3	2 2	• Manual • Seminars/ Workshops • Feedback to members	–	• Develop position statement on financing issues • Develop seminar material	• Promote financing requirements to Gov't/institutions
4. Operations Environment (taxes/licenses, land tenure, operating costs)	2	1	3	• Feedback to members • Seminars/ workshps	–	• Develop position statements • Identify member issues • Develop seminar material	• Promote issues resolution to Gov't
5. Product Protection (resource issues)	1	2	3	• Feedback to members	–	• Assemble issues compendium • Investigate resource co-management/ licensing strategies	• Define issues management strategy • Promote co-management • Promote position to public

Note: 1=Highest priority (short-term) 2=Medium priority (medium-term) 3=Lowest priority (long-term)

- issues management--involving lobbying activities undertaken by the Association on behalf of its members to protect and strengthen the industry.

4. THE CLIENTS FOR THE PRODUCT DEVELOPMENT PLAN

Ultimately, the benefits of a successful product development plan must accrue to individual operations in the sport fishing lodge/resort sector. However, for the purposes of structuring and implementing the plan, three client groups must be considered: individual operators, the Association itself, and government. As a consequence, the plan consists of three elements:

1. Programs for the B.C.F.R.O.A., which are outlined in Section E of this report;

2. A marketing and development manual for operator use, which is provided under separate cover;

3. Recommendations for government, which are included in this section.

Using the plan components described in Exhibit 6, we have identified how the plan should respond to the needs of individual operators and how the plan should structure an agenda for the Association. These are summarized in Exhibit 7.

5. NEEDS AND ROLE OF INDIVIDUAL OPERATORS

From an operator's perspective, the plan must include two main ingredients. First, operators need information and education in a variety of areas to support the move to both upgrade products as well as develop new ones. Second, a strong industry requires a strong Association and operators must contribute by providing information on the development of industry-wide positions and on resource issues. In addition, individual operators must offer feedback on programs that the Association delivers.

There are two general vehicles for delivery of information to individual operators; a manual on product development, and opportunities for education and training offered through the Association. Based on the information needs of operators (see Exhibit 7), a product development manual has been designed which includes:

Exhibit 7: Agenda for Individual Operators and Association

Product Development Plan Component	Requirements for Individual Operators	Agenda for Association
1. **Product orientation to existing/ potential markets** (product definition, development, packaging and pricing)	❑ Summary information on markets ❑ Education - "how to"	❑ Co-ordinate information distribution ❑ Develop packaging guidelines ❑ Sponsor workshops/ seminars
2. **Product Philosophy** (catch and release, wilderness setting, code of ethics)	❑ Incorporate philosophy in marketing/operations	❑ Develop philosophy ❑ Publish in marketing literature
3. **Capital Access**	❑ Education/information on business planning/increase professionalism ❑ Financing assistance programs	❑ Develop position on program requirements ❑ Lobby/work with government/financing institutions ❑ Co-ordinate/distribute literature
4. **Operations Environment** (taxes/licenses, land tenure operating costs)	❑ Information/education on operation management	❑ Develop positions/work with government ❑ Co-ordinate information distribution
5. **Product Protection** (resource issues)	❑ Operators to provide information on individual resource issues ❑ Information on resource management decision-making process	❑ Assemble/document resource concerns of memberships/devise strategy to address them with government ❑ Investigate licensing/co-management of resources ❑ Request advisory role in development/resource use decisions ❑ Develop public position in conjunction with code of ethics

- summary information on markets and how markets affect product orientation;
- information on how to adjust the product to both existing and potential market needs (facilities development, packaging, and pricing);
- information and step-by-step approaches to business planning and capital project design;
- information on preparing financing applications;
- operations and management methods (related to issues which operators raised concerning operating costs);

The manual alone cannot do the job of encouraging individual operators to adjust their products, improve operations, and address resource issues. This should be supplemented by a series of seminars and workshops organized through the Association for operators. In addition, use of existing training programs or the development of tailor-made training for operators must also be considered as part of the strategy to disseminate information.

The relationship between the individual operator and the Association is always a two-way street. Operators must provide the Association with input on the product development issues facing the industry as a whole, ranging from capital access to positions on taxes and licences affecting the industry. A particularly important function to be performed by individual operators is the provision of input towards development of a product philosophy, which the industry would adopt and imbed in a code of ethics.

Protection of their product is the concern of every operator and yet no individual operator can adequately address this issue. Therefore, the role of the Association as spokesperson for the industry is vital. Phase One was never intended to address resource management issues, although it became clear at that time that resource management was probably the most important issue identified by the industry. All that could be accomplished in Phase One was to report on the issue in general terms and alert the Province to some of the considerations which must be addressed in protecting the sport fishing lodge/resort product. The next step, and one critical to the success of the product development plan, is to assemble detailed information on individual resource issues faced by operators, so that the Association will be able to develop a professional and fully documented position on this matter. Therefore, individual operators should be encouraged to provide this information to assist the Association's lobbying efforts.

6. ROLE AND AGENDA FOR THE ASSOCIATION

In fulfilling its product development mandate on behalf of the industry, the B.C.F.R.O.A. agenda (see Exhibits 6 and 7) can be logically structured into four product development areas and summarized below.

1. **Information Services** (to membership, government and other audiences)

- distribution of the Product Development Manual
- seminars/workshops/training programs related to
    - product orientation
    - business planning/financing
    - operations and management
- feedback to members

2. **Development of a Product Philosophy Statement**

- code of ethics for incorporation into marketing literature
- catch and release philosophy

3. **Research Activities**

- data base and monitoring capability
- documentation of resource issues and concerns
- investigation of licensing/resource co-management systems
- financial impacts of taxes/licensing
- development of seminar materials
- refining industry positions on:
    - capital assistance programs tailored to the specific needs of the industry
    - the operations environment (taxes, licences, land tenure)
    - resource protection
    - advisory roles in land use decision making.

4. **Issues Management**

- interactions with:
  - government on capital access, operations environment and resource protection;
  - financing institutions on capital access (both promoting the industry and educating financial institutions)
  - other resource users on resource protection issues
  - the public on product philosophy.

This is an extensive agenda for the Association and is described in greater detail in Section E. Although implementing the product development plan will go a long way to towards advancing the agenda of the Association, it will require a strong commitment supported by funding and the contribution of time and effort by Association members.

7. ROLE AND AGENDA FOR GOVERNMENT

Neither the product development agenda nor the marketing strategy recommended for the B.C.F.R.O.A. can be accomplished without the support and encouragement of government. The industry has shown good faith in following one of the primary recommendations of the Phase One study; that is, to establish a province-wide organization representative of freshwater fishing lodge/resort operations. The enthusiasm and commitment of the Association Board of Directors is testimony to their belief in the future of the industry and their desire to improve its economic contribution. At the same time, it is an industry composed of small businesses. In this, their evolutionary, maturing stage, the Association cannot be expected to fully fund and manage the product development program.

There are three provincial government ministries responsible for aspects of the freshwater fishing resort sector. The Ministry of Tourism and Provincial Secretary has both a marketing and development responsibility. The Marketing Division will play a major role in the implementation of the marketing plan but, if it is to be effective, must be assured that steps are being taken to develop a product that is internationally competitive. The Research Services Branch provides data, information and analyses on tourism markets, opportunities and constraints which form the basis of industry marketing and development plans. The Tourism Product and Services Division addresses education and seminars, and provides assistance and leadership in packaging products. Their role will be essential in providing guidance to the Association on the development of

information services to its members. The Product and Planning Branch provides an advocacy function for tourism product development throughout government, maintains inter-ministry liaison, and co-ordinates the Ministry's overall product development approach. Here again, the mandate of this Division complements and can support efforts of the Association for overall product development. The Ministry of Regional Development, Tourism Development Branch, will work with the Association and the Ministry of Tourism and Provincial Secretary to assist in the development and expansion of fishing lodges and resorts as identified in the Fishing Lodges and Resorts Study. The Ministry of Regional Development will facilitate this development using a variety of business development and capital assistance programs. The Ministry of Environment, Fisheries Branch, has a clear mandate to protect and enhance the fisheries resource to the benefit of the public and, therefore, is a direct partner with both individual resort operators and the association in an on-going conservation effort.

In this context, several recommendations specific to the role of government in product development are provided.

1. The product development agenda for the Association is complex and, in most cases, will require interaction and consultation with government. This is best achieved through a joint program of action between the B.C.F.R.O.A. and government to effectively manage implementation of product development. Exhibit 8 provides an outline of the recommended joint program with respect to Product Development. The agenda for this discussion also includes the question of funding support for the B.C.F.R.O.A. product development programs. The Ministry of Tourism and Provincial Secretary is also responsible for Program C1 of the Tourism Sub-agreement (which provides funding for initiatives of tourism associations). The B.C.F.R.O.A. should approach the Ministry for funding support as part of discussion or implementation of the joint action program described in Exhibit 8.

2. The Ministry of Tourism and Provincial Secretary should arrange a meeting with relevant government ministries including the federal agency responsible for ERDA to reach an agreement in principal regarding the nature and extent of assistance to this sector over the next few years. Particular attention should be paid to an examination of the various

Exhibit 8: Joint Program with Ministry of Tourism and Provincial Secretary

Topic Areas
❑ Role of other Ministries (Regional Development, Environment) and co-ordination approach ❑ Funding support for B.C.F.R.O.A. product development programs ❑ Product development seminars - materials development ❑ Statistical data base capability and monitoring program ❑ Maintaining an up-to-date product development manual ❑ Capital access program parameters specific to the industry ❑ Joint study of resource co-management & licensing strategies. ❑ Association role relative to the Ministry of Environment freshwater fishing publication ❑ Identifing priority areas for development based on resource capacity and potential.

Tasks/Approach
❑ Meet with Ministry of Tourism and Provincial Secretary to review B.C.F.R.O.A. product development plan ❑ Determine roles and responsibilities of Ministry/B.C.F.R.O.A. and other Ministries ❑ Determine potential for funding B.C.F.R.O.A. programs in association with Ministries of Regional Development, and Tourism and Provincial Secretary* ❑ Devise joint action program including responsibilities and schedule ❑ Submit funding application under Program C1 of Tourism Sub-Agreement*

** The Ministry of Tourism and Provincial Secretary administers Program C of the Tourism Sub-Agreement. The B.C.F.R.O.A. should discuss funding potential under this program as soon as possible as the Sub-Agreement is nearing an end.*

financing programs currently administered by government and the potential for change to enable this sector to take better advantage of them. A summary of available capital access programs is provided in the Product Development Manual. When considering change to any programs, attention should be paid to the following:

2.1 Funding Assistance For Upgrading and Product Diversification

a. Capital funding requirements are dominated by the need to upgrade facilities and diversify products. Given that the majority of operations which will seek funding assistance for this effort earn revenues of $150,000 or less, funding programs should be designed to accommodate applications for capital assistance for less than the $150,000 being currently applied (with matching funds invested by the applicant) under ERDA. A suggested starting point for consideration is about $75,000.

b. Part of the criteria for asssessing such applications for capital financing should be the degree to which the resulting facility will be oriented to the priority target markets identified in the Phase One study and subsequently refined in this marketing strategy. In other words, applications should be designed with specific target markets in mind.

c. Applicants should be required to submit a business plan which specifically references the impact of the proposed capital upgrading/product diversification in terms of new or additional market attraction and revenue generation.

2. 2 Funding Assistance for New Operations

a. The emphasis on new fishing lodge/resort development should be twofold: for products which are international class in nature, and for resort/lodges which offer a "wilderness fishing experience" to both fishing enthusiasts and family markets. Currently, ERDA programs generally consider funding for capital projects exceeding $150,000. Even for new operations which start on a small scale, this minimum application requirement is judged to be too high for the fishing lodge/resort

industry in general. It is, therefore, recommended that the ministries lower the minimum to $75,000.

b. In addition to normal business plans and related application material in support of such funding applications, it is recommended that proposers also submit a statement of the resource base potential and estimated carrying capacity for their selected location. This statement should include reference to potential impacts on nearby fishing lodge/resort operations. In light of the considerable concern raised by operators about the resource environment, this additional information should become a normal part of the application review process for considering lodge/resort applications.

2.3. Resource Management Study

The ministries of Environment, Tourism and Regional Development should consider a joint study with the B.C.F.R.O.A. to explore resource co-management and licensing strategies for the industry. Determination of the level of interest in and potential for individual operators to undertake resource co-management is recommended as a specific research program for the B.C.F.R.O.A.

2.4. Publication of Fishing Regulations

Consistent with the recommendations of both the product development and marketing strategy, the Ministry of Environment should meet with the B.C.F.R.O.A. to open a dialogue on alternative roles which the Association can play in the freshwater fishing regulation publication process.

2.5. Resort Expansion

The Ministry of Regional Development or the Ministry of Tourism should take a proactive role in identifying those parts of the province or sub sectors within the freshwater fishing industry that justify the expansion of facilities. This may require clearly identifying tourism development zones in which the potential for high economic returns on the freshwater recreational fishery is greatest. On the

basis of such information, a proactive stance could be taken to the attraction of capital for resort development and the protection of the resource from other conflicting uses.

8. CONCLUSION

The freshwater fishing resort sector is at a crossroads. A decision by government and the private sector to do nothing to strengthen the industry is an option. But if this option were chosen, there would be three consequences: the potential yield of the fishery resource would not be realized and much public sector spending of the past would essentially have been in vain; several businesses that contribute to small communities in the interior would fail; and a real opportunity to create economic diversification in the interior of this province will have been lost.

Since the completion of the Phase One study, the industry has shown much good faith and determination in reorganizing and remotivating itself. The government has funded both the research and a plan to make the changes. What is needed now is both the political will and commitment by all players to share a common vision of change and growth, and the investment of resources to reach that vision.

E. ORGANIZATION AND IMPLEMENTATION

In order to implement the strategy outlined in this report, some modifications are necessary to the existing organizational structure of the industry and its relationship with government. This is especially the case where marketing is concerned. In the case of product development, specific actions that could be undertaken by the B.C. Fishing Resorts and Outfitters Association are identified along with those government ministries with which the Association must work in order to be effective.

1. KEY PLAYERS

The marketing of British Columbia's freshwater fishing resort product is currently undertaken by a number of agencies whose activities need better co-ordination. Consequently, both gaps and duplications exist. The key players and the extent of their activities are as follows:

1. Ministry of Tourism, and Provincial Secretary, Marketing Division

1.1 As part of its generic marketing awareness campaign, the Ministry of Tourism and Provincial Secretary positions the fishing product as a sub component of an outdoor, soft adventure experience. The aim is to appeal to as broad an audience as possible. The two fishing-oriented ads developed for the 1989 fiscal year are illustrated in Exhibit 9. The ads are placed in such publications as Outside, Sierra, Audubon, Esquire, Outdoor Life, and Field and Stream. The call to action is the Ministry's 1-800 number and inquirers who respond to the fishing advertisements receive a copy of the Freshwater Fishing Directory, the Travel Planner, Accommodation Guide and Road map. In a 52 week period commencing March 1, 1988 fiscal year, the advertising campaign generated 1922 telephone inquiries that were directly related to fishing. Of this total, 895 inquiries took place in weeks 50 - 52, immediately after the fishing related advertising was placed and in response to some strong publicity obtained in California. The Ministry estimates that it currently spends approximately $263,000 on direct consumer advertising relating to the

fishing product. A further $15,000 was spent on inquiry fulfillment.

1.2 The Ministry supported the publication of the Freshwater Fishing Guide in 1988 through direct purchase of the front and back cover and through the Partners in Tourism Program, whereby private sector marketing dollars were matched on a 50-50 basis. A total of $39,000 was invested in this publication, plus time spent by ministry personnel assisting with the design, proofreading and editing.

1.3 The Ministry also contributes to the marketing of freshwater fishing resorts via the Partners in Tourism program. Regional Tourism Associations can access matching funds from the Ministry for the publication of regional brochures, attendance at sportsmen shows and direct consumer advertising campaigns. The importance assigned to freshwater fishing by each of the regions varies significantly and it is very difficult to identify the total amount of dollars devoted to this product line via Partners in Tourism(PIT).

1.4 Publicity, public relations and the organization of familiarization tours are on-going functions of the Marketing Division. A portion of the on-going effort is directed specifically at the freshwater product. For example, Leone and Leone, the Ministry's public relations firm in the U.S., recently obtained extensive coverage in the media regarding the B.C. fishing product. While the precise dollar value associated with these activities cannot be determined accurately, there is little doubt as to its effectiveness.

1.5 The Ministry attends a number of key consumer and trade shows directed at the outdoor/adventure market and both directly and indirectly promotes the freshwater fishing product. The Ministry's role is to respond to questions from show attendees and distribute relevant literature. However, there is no exhibit booth that highlights freshwater fishing.

Exhibit 9

Announcing another spectacular
season of family viewing
Super Natural British Columbia

Exhibit 9

No phones but one hell of a fish story.
You can get through to the bears weights around here. Like coastal salmon large enough to get
you measurements on the Best Ash Lodge a lot of people have been getting tied up with rainbows up
to about 14kgs. Pocket becomes tied Dolly Varden or bobber? Just bring your regular gear. For all
or fresh water fishing there's no place quite as engaging. Make an appointment for a luxurious lodge
with an retreat. Call 1-800-663-6000. Tourism British Columbia, Parliament Building, Victoria, BC.
V8V 1X4 We've got your number.
Super Natural British Columbia

2. Regional Tourism Associations

The nine tourism associations are responsible for promoting visitation to each region via the Partners in Tourism program. Their primary focus is placed on the close-in touring markets and fishing, like any other specialty product, is promoted in direct relation to the proportion of members who sell the product. The regions most active in promoting freshwater fishing are as follows:

Cariboo Chilcotin-Coast: This regional tourism association has over forty members who run freshwater fishing resorts, many of which offer quality fly-in fishing experiences at prices exceeding $150 per day. Since the region also offers a variety of soft adventure experiences, such as canoeing, guest ranch stays, hiking, nature observation, etc., the association aggressively promotes outdoor recreation products. According to the Cariboo Tourist Association 1989 Marketing Plan, strategies for promoting the outdoor recreation product in summer include:

- Continue to develop a Cariboo section in the *Fishing and Hunting News* newspaper in the United States with toll free lines.

- Develop editorial and/or editorial-ad sections in various outdoor publications: *Salmon/Trout/Steelheader, Western Flyer, Gray's Sporting Journal, Fly Fisherman, B.C. SportFishing* and others.

- Attend Sportsmen Shows in Vancouver, Seattle (2), Portland, San Franciso Bay (3), Los Angeles Basin, Sacramento, Toronto, other western U.S., Calgary, Edmonton, Victoria, Kamloops.

- Increase promotion of toll-free phone line to the USA.

- Segment sportfishing activites into marketing categories, such as fly-fishing, father and son, family.

In the 1988-89 marketing plan, a budget of $285,000 was allocated. Of this total, at least 35% can probably be attributed to the freshwater fishing product.

The *North by Northwest Tourism Association* estimates that it has approximately 15 resort operators that are members of their regional association. They undertake a joint hunting and fishing campaign for a total of $40,000, of which 40% could be attributed to fishing (both salt and freshwater). In addition, the association spends approximately $6,000 on trade shows and $10,000 supporting member advertising in the Freshwater Fishing Guide, the Saltwater Guide, the Freshwater Fishing Regulations and the *B.C. Sports Fishing Magazine.*

The *Okanagan-Similkameen Tourism Association* estimates that it has three members who operate a freshwater lodge and they estimate that they spend $10,000 a year promoting this product.

The *High Country Tourism Region* has 23 members who have freshwater fishing resorts and, according to the Executive Director, the association spends $30,000 gross on promoting this product line.

3. The B.C. Fishing Resorts and Outfitters Association

This Association was formed fourteen years ago under the name of the B.C. Interior Fishing Camp Operators Association and was formally registered in 1988. It initially comprised approximately 20 members, most of whom were located near Kamloops. As a consequence, the Association was perceived by many other lodges to be focused only on that particular geographical area. The Association has since marketed its services more aggressively throughout the province and in 1989 changed its name to the B.C. Fishing Resorts and Outfitters Association. By 1989, membership had risen to 75 resorts and outfitters who paid a flat membership fee of $175. The total operating revenue of the Association stood at $13,000. Despite this modest budget and due to significant amounts of volunteer activity, the Association has accomplished much over the past twelve months. The primary focus has been on advocacy activities associated with resource protection. The Executive Director and Board of Directors have also made significant progress in

the areas of marketing - through the production of the Freshwater Fishing Guide- and the development of member services - through the development of a bonding and insurance program.

In 1988, the Association directed and co-ordinated the production of the first Freshwater Fishing Guide and assisted the publisher - *B.C. Sports Fishing Magazine* - to raise approximately $16,000 in advertising funds from the private sector.

4. Ministry of Environment, Recreational Fisheries Branch

This branch of the provincial government is responsible for the protection, enhancement and management of the freshwater fisheries resource in British Columbia and publishes a synopsis of the Fishing Regulations each year. In 1988, the regulations were expanded to a 70 page booklet that outlined both the provincial regulations in general, as well as details on each river and lake. In addition, the 1988 publication included information on the tourism regions and advertising by a number of suppliers including resorts, fishing tackle and other fishing-related manufacturers. The regulations were published in partnership with *B.C. Outdoors* magazine; over 500,000 copies were printed. Approximately $70,000 was raised from the private sector in advertising revenue to offset printing costs.

2. STRENGTHS AND WEAKNESSES OF THE EXISTING MARKETING STRUCTURE

The total amount of money spent on collectively marketing freshwater fishing experiences by the four major groups described above exceeded $500,000 in 1988. (Exhibit 10). In addition, operators spend significant sums promoting their own individual operations through brochures, attendance at trade shows and direct sales.

Exhibit 10
Funds Currently Allocated to Collective Marketing of the Freshwater Fishing Resort Product

Source	
Ministry Consumer Advertising, Guide & PIT	$320,000
Guide Advertising Revenue	$ 16,000
Regional Tourism Association Expenditures	$150,000
Recreational Fisheries Ad revenue from Regulations Synopsis	$ 70,000
Total	**$556,000**

In order to increase the effectiveness of our marketing efforts, the following weaknesses in the existing pattern of marketing need to be addressed.

1. The amount of communication and co-ordination of marketing activity between the four groups needs to be improved. There is no one organization currently responsible for taking a leadership role. At the present time, the B.C. Fishing Resorts and Outfitters Association lacks the financial and human resources necessary to achieve the marketing objectives outlined in this plan. At the same time, it is the only organization that specifically represents the interests of fishing resort operators throughout the province. If the potential increase in revenues to the freshwater fishing resort sector is to be realized, an investment in the organizational structure will be necessary.

2. The small scale nature of most resort operators makes it difficult and onerous to have to support multiple organizations. An operator of a campground/fishing resort is typically faced with having to join the B.C.F.R.O.A. in order to ensure that the resource is protected; a local regional tourism association for access to PIT funds; the B.C. Motels, Resorts and Campgrounds Association for assistance with matters relating to the resort or campground; and, if adventure/wilderness-related activities are also offered, the Wilderness Tourism Council.

3. The current marketing activities appear to be too generalized and "shotgun" to apply to this sector. The research suggests that the product appeals to two very different target markets: a budget conscious, family-oriented market located mostly in British Columbia and close-in markets and, secondly, a fishing-enthusiast market of more demanding, "up market" consumers drawn from broader geographical areas. The medium and message chosen to reach these markets should, therefore, be quite different.

4. At the present time, we are printing ten times more booklets which essentially tell the consumer what NOT to do, than we are printing attractive lure pieces designed to attract the consumer to purchase the product. Over 500,000 copies of the regulations are printed, compared to only 65,000 copies of the Freshwater Fishing Guide. The amount of advertising revenue that can be derived from both operators and other fishing-related suppliers is limited. At the present time, the impact of that revenue is being diluted. It would be more appropriate to channel the advertising revenue into the lure publication and have the Ministry of Environment pay the full cost of publishing the regulations.

5. There is a lack of focus on the domestic market. Programs aimed at the BC. resident market are currently conducted by individual regions under the PIT program. The freshwater fishing resort experience has not been aggressively marketed as a vacation option. The plan recommended herein places more emphasis on newspaper advertising directed at resident and close- in markets, with specialty fishing magazines being used to reach the fishing enthusiast.

6. There is a significant lack of sophisticated marketing skills throughout the sector and many operators are keen to upgrade their marketing and managment abilities.

7. Government funds are available on a program by program basis and each program has its limitations of scope and eligibility. It becomes very difficult, time consuming and, therefore, expensive to access financial resources to support collective marketing endeavours in an integrated way.

3. ORGANIZATIONAL RECOMMENDATIONS

In light of the weaknesses noted above and the inherent potential of the freshwater fishing industry, the consultants recommend that the following approaches be considered:

1. A Steering Committee of all those agencies and associations that are currently responsible for marketing freshwater fishing resorts should be formed and be assigned the leadership role responsible for coordinating and steering all collective marketing activities on behalf of the freshwater resort sector. The Steering Committee should comprise representation from the B.C.F.R.O.A., the regional associations which actively promote freshwater fishing, the Ministry of Tourism and Provincial Secretary, and those other government agencies which contribute resources for marketing, research and product development in an on-going manner. In this capacity, the Steering Committee will be responsible for the following:

    - Producing an annual marketing plan and budget acceptable to the Ministry, the regional tourism associations, and association members.

    - Coordinating the activities necessary to implement the plan.

    - Raising marketing resources from sponsors and operators.

    - Taking a proactive stance towards the sale of freshwater fishing products through the development of a centralized sales mechanism, the cataloguing of packages for long-haul markets and attendance at trade shows.

    - Monitoring the effectiveness of marketing tactics through the administration of on-going research.

2. The various funding agencies should be approached annually at the time of their budget preparations for the contributions to the overall marketing plan. These funds should be assigned to a freshwater fishing marketing fund. The funding sources include: the Ministry of Tourism, the ERDA Sub Agreement, regional associations, sponsors and resort owner operators who are members of the Association. Exhibit 11 provides a breakdown of potential funding sources.

Exhibit 11
Potential Funding Sources for Revised Marketing Plan

Source	
Ministry of Tourism	$300,000
Private Sector (contributions via PIT)	$ 75,000
ERDA (Int'l Marketing)	$ 55,000
Other Sponsors and Advertisers	$ 75,000
Total	**$505,000**

3. The Marketing Steering Committee should retain a Marketing Co-ordinator to implement the marketing plan, and to supervise and co-ordinate all collective marketing programs that relate to the marketing of freshwater fishing resorts in British Columbia. For certain activities, direct control should be assigned to the B.C. Freshwater Fishing Resorts and Outfitters Association, which would direct the Co-ordinator to undertake those activities which the Ministry cannot handle internally. This approach is recommended for the following reasons: the Ministry only has the mandate to create awareness of B.C. as a destination, and fishing as an attractive product. It cannot merchandise the product. There is a need for an agency to collectively merchandise fishing resort experiences. Normally, this function would be undertaken by commercial, inbound tour operators but, in this case, the revenue potential and profit margins are currently too small. By building up the strength of the Association, the Ministry will enable this merchandising function to happen.

4. The B.C. Fishing Resorts and Outfitters Association, the regional tourism associations, and the B.C. Motels, Resorts and Campgrounds Association should be encouraged to negotiate a collective fee structure that would benefit both operators and associations. For example, resort operators could be asked to pay one set of membership dues that would enable them to join the three organizations simultaneously. The roles and responsibilities of each organization could be more carefully delineated in order to avoid conflict and duplication. A suggested delineation might be as follows:

The *B.C. Fishing Resorts and Outfitters Association* will focus on advocacy activities associated with protecting the resource base. It should be positioned as the source of information regarding freshwater fishing tourism in the province. The Association will also be an important member of the Marketing Steering Committee.

The *regional tourism associations* will concentrate on destination specific marketing aimed particularly at the touring market. Fishing will be presented as one of several activities and products that make a region attractive as a vacation or touring destination. While the regions should be supplied with freshwater fishing fulfillment material in order to be able to respond promptly to inquiries, their marketing focus will be on presenting the region as a destination.

The *B.C. Motels, Resorts and Campgrounds Association* will focus on providing group member benefits such as credit card discounts and the advocacy and educational activities associated with this aspect of the lodging sector. Co-sponsorship of business seminars should be investigated as many management/operational issues are common to all types of resorts and campgrounds.

There are several advantages to this shared, collective approach. The cost of obtaining members could be reduced significantly for each association. Communication within the resort industry could also be significantly improved. While each association may lose revenue per membership, the total number of members would increase and the revenue per individual association would remain the same. The political "clout"

associated with increased representation would also help the Association, along with the savings that would accrue from increased buying power. The costs involved in communicating with members via newsletter, etc., could also be reduced.

5. In light of the multiple common areas of concern, the B.C. Fishing Resorts and Outfitters Association should consider sharing joint office space with one of the regional tourism associations.

4. THE FUTURE ROLE AND STRUCTURE OF THE B.C.F.R.O.A.

This association should position itself as the leadership organization representing the interests of freshwater fishing resorts and those outfitters whose livelihood depends upon the success of this sector.

The Association logo can be used to convey the type and quality of experience offered by members of the Association and is presented in Exhibit 12.

As the Association representing freshwater fishing resorts in British Columbia, it should undertake activities in the following functional areas: advocacy, product development, marketing, education, research and membership.

1. *Advocacy/Resource Protection*

The most important function of the Association will be lobbying government, the public and other users of the resource for improved land, water and fisheries management. No other association has the mandate, the expertise, nor the vested interest necessary to perform this task. Unless the resource base is protected and enhanced, all other Association activities will be pointless.

In order to be an effective lobbying force, the Association must develop profile and credibility. The advocacy function should be undertaken in order to achieve the following objectives:

Exhibit 12

B.C. FISHING RESORTS AND
OUTFITTERS ASSOCIATION

- to seek full recognition of the economic role which the freshwater fishing lodge/resort sector plays in British Columbia;

- to promote the industry's concerns to government and private sector organizations such as the banking community;

- to establish a cooperative relationship with other outdoor recreation related travel organizations on common concerns such as resource management;

- to promote co-management strategies and cooperation with governments in the resource area.

Position Paper: One of the first activities, therefore, should be the production of a position paper which outlines the following:

i. The scope and impact of the freshwater fishing resort sector and the nature of the Association's membership.

ii. The goals and objectives of the Association.

iii. The Association's "Code of Ethics".

iv. A statement of key issues, concerns and the Association's position on each of the issues.

v. Facts on the financial and employment potential of this sector.

The paper should be presented to Cabinet and distributed to all M.L.A.'s, members of Parliament and municipal politicians whose constituencies include resort operators, and telephone follow-up made to establish an on-going dialogue. As importantly, the paper should be distributed to other key associations and influencers in the tourism industry. Other potential recipients could include the financial community, key business associations in the community and resource managers. The contents of the paper should emphasize a business development message (i.e., over 250 businesses in rural regions in British Columbia depend on a sympathetic resource management and regulatory environment to maintain and upgrade

their business). The contents of the proposed position paper are presented in Exhibit 13.

Collaboration with Other Associations: The B.C.F.R.O.A. is not alone in its concerns regarding resource protection, regulations, access to capital, etc., and, where appropriate, should join forces with other outdoor-recreation related business associations, such as the Wilderness Tourism Council, the Guest Ranch Operators Association and the Guides and Outfitters, in order to share information and concerns and present stronger, common positions for presentation to government.

Seminars with the Banking Community: Industry operators identified access to capital as a major constraint to their business growth. The Tourism Development Branch of the Ministry of Regional Development has recently started a seminar and dialogue process with the financial community to explain and profile the business of tourism. The B.C.F.R.O.A. should co-ordinate their own efforts in this regard with the Tourism Development Branch with a view to holding seminars with regional banking officials and with providing the finance community with information on this sector.

Public Relations: Public support is vital to many of the major resource management concerns of the industry. The B.C.F.R.O.A. should promote its philosophy of maintenance and enhancement of the wilderness setting, catch and release, and protection of the value of the "total fishing experience" to the public. This activity will involve a program of public speaking engagements, articles in fishing-related publications and "letters to the editor", etc..

2. ***Product Development***

The long-term vitality of the resort sector depends upon the supply of quality, viable products; a secure, quality natural resource; and access to equity and debt servicing capital. In order to participate in product development, the Association should undertake the following activities.

Code of Ethics: the Association should develop and publish a Code of Ethics/Product Philosophy. This Code of Ethics would specify standards of service that Association members would guarantee their customers.

EXHIBIT 13: PROPOSED INDUSTRY POSITION PAPER

Suggested Table of Contents	Points to Highlight
1. Industry Profile	❑ Over 250 businesses throughout rural British Columbia ❑ Product lines ranging from family experience to international-class fishing opportunities ❑ Profile of typical fishing lodge/resort
2. Industry Capital Investment	❑ Description of capital plant ❑ Investment by operators ❑ Land ownership/tenure
3. Industry Revenue Profile	❑ Total industry revenues ❑ Profile of industry types by revenue levels
4. Economic Contribution	❑ Gross economic impacts and value-added ❑ Perspective on rural economic development ❑ Complementarity to province's priority on "sustainable economic development"
5. Industry Organization	❑ Evolution of B.C.F.R.O.A. - industry organization and goals ❑ Code of Ethics
6. Industry Growth Profile	❑ Document Phase 1 and marketing strategy results ❑ B.C.F.R.O.A. growth targets
7. Key Issues Facing the Industry	❑ Product orientation ❑ Capital access ❑ Land tenure ❑ Resource management
8. Approaches to Addressing Issues	❑ Role of B.C.F.R.O.A. ❑ Action programs

A sample Code of Ethics is presented in Exhibit 14. This is based on the version used by the Guides and Outfitters Association of British Columbia and serves to illustrate the type of content normally included.

Norms Manual: this publication would outline the major costs and revenues associated with building, operating and marketing different types of resorts. Such a Norms Manual would provide the banking community with a benchmark with which to evaluate proposals to upgrade and expand new lodges.

Product Development and Marketing Manual: the Association should ensure that this manual is distributed to its members and should support the publication with instructive seminars (see education function below).

3. ***Marketing***

In light of the need to market the resort experience as a specialty vacation product and the need for a focused organization, the B.C.F.R.O.A. will need to expand its marketing emphasis and capabilities. The Association should form an important part of the Marketing Steering Committee which, in turn, should retain a marketing and sales co-ordinator who will be responsible for developing and implementing the marketing plan in full cooperation with the Ministry, the nine tourism regions, and Association members.

The co-ordinator should be paid a base salary, plus a bonus based upon sales performance. From a day-to-day administrative perspective, the co-ordinator will report to the Marketing Steering Committee. The specific marketing tasks are outlined in the tactical component of the Marketing Plan in Section C of this report.

4. ***Education***

The strength of the freshwater fishing resort sector ultimately depends on the level of the marketing, management and operational skills of the operators. The Association should play a leadership role in upgrading their member's skills and knowledge. This function can be performed in three ways: program development, co-ordination with the post secondary educational system and communication with members.

EXHIBIT 14: SAMPLE CODE OF ETHICS

Members of the British Columbia Fishing Resorts and Outfitters Association offer a range of B.C. fishing experiences, from fly fishing for steelhead on wilderness rivers, to family vacations at remote resorts with a fishing theme. Members of the Association adhere to a code of ethics developed by our industry to ensure that you, the customer, are provided with the highest quality of professional service.

- *A member is required to maintain facilities and provide a fishing experience commensurate with that which the operator has advertised to the public.*
- *Members are concerned about maintaining both the fishery and wilderness resource, and practice catch and release and other conservation methods.*
- *Members promote sound conservation practices to their employees and customers.*
- *Members are familiar with the British Columbia fishing regulations and other related statutes and regulations. Members at all times are in a position to advise customers of their rights and responsibilities, or refer customers to appropriate authorities.*
- *A member shall not cause, encourage, or condone any violation of the fisheries regulations.*
- *Members maintain high standards of public safety.*

The British Columbia Fishing Resorts and Outfitters Association is committed to ensuring that your fishing experience is both rewarding and memorable. If you feel we can be of assistance, please write or call:

British Columbia Fishing Resort and Outfitters Association

(address)

(phone)

Program Development: The Association should sponsor seminars for their members on such topics as marketing, market research, writing effective business plans, packaging and programming, product upgrading, etc.. Development assistance for such seminars should be obtained from ERDA. Other sponsors might include the

FBDB, the Pacific Rim Institute of Tourism, or the B.C. Motels, Resorts and Campground Association.

Co-ordination: The Association should develop ties with community colleges and the Pacific Rim Institute of Tourism to identify and promote those education and training programs which might be of value to its members.

Communication with Members: By positioning itself as the voice of the freshwater fishing resort sector, the Association should also become the clearinghouse of information and news of value to its members. The Association should communicate with its members on at least a quarterly basis via a newsletter that not only contains information about Association activities, but also useful marketing tips, research results, information regarding changes or additions to the collective marketing plan, information on media, etc..

5. ***Research***

Three types of research need to be undertaken by the Association:

On-going performance measurement and impact assessment: Maintenance of an accurate and comprehensive database concerning the number and type of resorts, business volumes and capital expenditures will be crucial to the development of a credible, strong Association. As a condition of membership in the Association, resort operators should agree to supply monthly occupancy and performance data and to administer guest surveys that can help guide the collective marketing effort. Samples of such report sheets and guest surveys are provided in the Marketing and Development manual. With the aid of financial assistance from the ERDA agreement, the Association should retain the services of a research firm to design the survey, administer the questionnaires and

analyse the results. Part of the contract should require that the consultants set up a simple software program and train Association personnel to conduct the survey in subsequent years. A less expensive approach would be to use the services of students studying tourism marketing at B.C.I.T.

The Association should produce annual indicator statistics for its members. Publication of such statistics as occupancy, room night revenues, market sources, etc., will enable individual properties to evaluate their progress against that of the industry as a whole. Such information will also enable the government to track the effectiveness of marketing activity in terms of return on investment and will provide the investment/business community with the information necessary to justify investment or loan decisions.

Product Development Research Priorities

Four research areas are recommended for immediate action by the B.C.F.R.O.A., in association with government under the provisions of the joint action program with government described in Section D of this report. The objectives and tasks for each research area are shown in Exhibit 15 and a recommended budget is provided below.

- Industry Access to Capital -- largely involves a consultation process with government, circulation of a proposed position to industry membership for review, and preparation of an industry statement. Estimated budget -- $10,000.

- Operational Environment -- involves compilation of operator concerns and documentation of the impact of Crown lease arrangements, permits, and other regulation requirements, and the development of an industry position. Estimated budget -- $10,000 (for term research assistant).

- Resource Issue Profile -- involving a mail-out survey to operators to compile individual resource concerns. Estimated budget -- $15,000 (for retention of a survey contractor, compilation of survey results, and preparation of a summary report).

- Resource Co-Management -- involving a comprehensive study to develop a resource co-management strategy approach. Estimated budget -- $40,000 (for consulting services).

6. ***Membership Support***

As recommended above, the B.C.F.R.O.A. should initiate negotiations with the regional associations and the B.C. Motels, Resorts and Campgrounds Association to determine whether an arrangement could be made for a collective membership and marketing approach. If agreed upon, resort operators would be approached to join three associations at once and the fee structure could be pro-rated equally between the two sector associations and the relevant regional organization. A membership kit should be prepared which explains the role and function of each association and the benefits offered members.

7. ***Product Development, Marketing and Association Budget***

A proposed budget and source of funding for the activities listed above is contained in Exhibit 16. Since funds under the Program C component of the ERDA agreement will only be available for two more years, the Association is encouraged to start discussions with relevant Ministry personnel at the earliest opportunity.

This is a budget for Year One and includes several "one-time" items such as the research project into resource management issues, the Norms Manual and Information Kit. Consequently, the annual budget neccessary to cover overhead, marketing, development, advocacy, education and research functions will average approximately $500,000 per year, equivalent to 2.3% of total industry revenue.

Exhibit 15. Product development Research Priorities

Research Area 1: Industry Access to Capital

This research area focuses on development of an industry position on access to capital for sport fishing lodge/resort operators that can be used in discussions with both government and conventional lending institutions.

Tasks

- ❑ *Review and refine draft funding program guidelines in Section D, Product Development Strategy*
- ❑ *Undertake consultation with Ministry of Regional Development to confirm proposed industry approach.*
- ❑ *Circulate to members to secure comments and suggestions.*
- ❑ *Finalize industry position statement.*

Research Area 2: Operational Environment

The purpose of this research area is to develop a refined industry position (or positions) on the operational environment facing the industry.

Tasks

- ❑ *Refine documentation on the impact of Crown lease arrangements on growth potential. This would include a description of the proposed priorities for industry product development and constraints encountered in both financing and securing of development permits.*
- ❑ *Compile and consolidate data on permit and regulation requirements encountered by operators.*
- ❑ *Investigate options for an industry position to promote to government.*

Research Area 3: Resource Issue Profile

The purpose of this research area is to develop a full resource issue profile representative of the industry at large and individual operators.

Tasks

- ❑ *Identify potential for support from Ministry of Environment*
- ❑ *Design survey questionnaire for operator resource concerns.*
- ❑ *Undertake mail-out survey to operators and compile and classify results.*
- ❑ *Prepare summary report to be used as the basis for discussions with government.*

Research Area 4: Resource Co-Management

The purpose of this research activity is (i) to determine the industry interest in, and appropriate role for, resource co-management and (ii) develop a co-management strategy.

Tasks

- ❑ *Consult with Manitoba operators and government officials, and other jurisdictions, regarding systems of licensing and co-management.*
- ❑ *Prepare a detailed analysis of options.*
- ❑ *Canvas members to determine level of interest.*
- ❑ *Define examples in "case study" format to illustrate resource co-management approaches.*
- ❑ *Develop industry position to be used as the basis for discussions with government.*

Exhibit 16
Budget for the Marketing and Development of Freshwater Resorts (Year One)

Program	Resource required	Potential Sources: YEAR ONE	
Office Overhead			
Executive Director	$35,000.00	Membership	
Marketing Co-ordinator	$35,000.00	Steering Committee	20000
Office	$15,000.00	ERDA Program C	20000
Travel	$5,000.00		
Sub Total	**$90,000.00**		**90000**
Marketing Plan	$440,500.00	See Exhibit 7	
Advocacy			
- Information Kit	$3,000.00	ERDA Program C	
-Collaboration (travel)	$1,000.00	Membership	
- Seminars with Banks	$500.00	Membership	
-Public relations (travel)	$1,000.00	Membership	
Product development			
- Code of Ethics	$500.00	Membership	
- Norms Manual	$25,000.00	ERDA Program C	
- Product Development Manual	$1,000.00	ERDA Program C	
Education			
- Seminars	See Marketing Plan	ERDA Program C	
- Newsletter	$1,500.00	ERDA Program C	
Research			
- Quarterly Statistics	See Marketing Plan	ERDA Program C	
- Marketing Evaluation	See Marketing Plan	Ministry Research Budget	
- Resource Management Issues	$75,000.00	Tourism, Reg Dev & Environment	
Membership Support	$0.00		
Total	**$639,000.00**		
FUNDING SOURCES			
Ministry of Tourism			
- Marketing Budget	$286,000.00		
- Research Budget (Mktg Evaluation)	$25,000.00		
- Development Budget (Resource Issues)	$25,000.00		
ERDA			
Program A (Int'l Marketing)	$55,000.00		
Program C (Support)	$50,500.00		
Ministry of Environment (Resource Issues)	**$25,000.00**		
Ministry of Regional Development (R.issues)	**$25,000.00**		
Private Sector			
Membership Revenues	$22,500.00		
Advertising/ Listing Sales/Sponsorship	$50,000.00		
Other Contributions (currently RTA's)	$75,000.00		
TOTAL	**$639,000.00**		

APPENDIX A

Event	**Anaheim Sports Vac & RV Show**
Location	**Anaheim**
Province	**CA**
Date	89/01/07 - 89/01/15
Contact	Ms. Marilyn Howard, Sales Director
Company	H. Werner Buck Enterprises
Street	3031 West Burbank Blvd.
City	Burbank
Prov.	CA
Postal	91505
Phone	818 841 9850
Toll free	
Fax	
Booth Cost	.00

Event	**Calgary Sportsmen's Show**
Location	**Calgary**
Province	**AB**
Date	89/03/30 - 89/04/02
Contact	Mr. Blaine Woit
Company	Canadian National Sportsmens Show
Street	Suite 201, 4547 East Hastings
City	Burnaby
Prov.	BC
Postal	V5C 2K3
Phone	604 291 6651
Toll free	800 663 8815
Fax	604 291 0412
Booth Cost	450.00

Event	**Edmonton Hunting & Fishing**
Location	**Edmonton**
Province	**AB**
Date	88/08/25 - 88/08/28
Contact	Mr. Rex Armstead
Company	Major Event Management Ltd.
Street	600 - 1130 West Pender
City	Vancouver
Prov.	BC
Postal	V6E 2R6
Phone	604 681 8126
Toll free	
Fax	
Booth Cost	.00

Event	**Edmonton Sportsmens's Show**
Location	**Edmonton**
Province	**AB**
Date	89/03/08 - 89/03/12
Contact	Mr. Peter Kirk
Company	Canadian National Sportsmen's Show
Street	Suite 201, 4547 East Hastings Street
City	Vancouver
Prov.	BC
Postal	V5C 2K3
Phone	604 291 6651
Toll free	800 663 8815
Fax	604 291 0412
Booth Cost	550.00

Event	**Fall Fishing/Winter Sports Show**
Location	**Tacoma**
Province	**WA**
Date	89/01/25 - 89/01/29
Contact	Mr. Michael O'Loughlin, Show Producer
Company	To-Ro Trade Shows Inc.
Street	P.O. Box 110849
City	Tacoma
Prov.	WA
Postal	98411-0849
Phone	206 756 2121
Toll free	
Fax	
Booth Cost	450.00

Event	**Fall RV Sports & Vacation Show**
Location	**San Diego**
Province	**CA**
Date	88/10/06 - 88/10/09
Contact	Ms. Arlene Gittleman
Company	Southwest Exhibitors Inc.
Street	P.O. Box 2747
City	La Jolla
Prov.	CA
Postal	92038
Phone	619 457 1559
Toll free	
Fax	
Booth Cost	.00

Event	**Fall Sportsmen's Show**
Location	**Portland**
Province	**OR**
Date	88/09/08 - 88/09/11
Contact	Mr. Michael O'Loughlin
Company	To-Ro Trade Shows Inc.
Street	P.O. Box 25348
City	Portland
Prov.	OR
Postal	97225-0348
Phone	503 246 8291
Toll free	
Fax	
Booth Cost	350.00

Event	**International Sportsmen's Exposit**
Location	**Sacramento**
Province	**CA**
Date	89/01/04 - 89/01/08
Contact	Mr. Ed Rice, President
Company	International Sportsmen's Expositions
Street	P.O. Box 2569
City	Vancouver
Prov.	WA
Postal	98668-2569
Phone	206 693 3700
Toll free	
Fax	
Booth Cost	550.00

Event	International Sportsmen's Exposit
Location	San Mateo
Province	CA
Date	89/03/15 - 89/02/19
Contact	Mr. Ed Rice, President
Company	International Sportsmen's Expositions
Street	P.O. Box 2569
City	Vancouver
Prov.	WA
Postal	98668-2569
Phone	206 693 3700
Toll free	
Fax	
Booth Cost	550.00

Event	International Sportsmen's Exposit
Location	Denver
Province	CO
Date	89/02/22 - 89/02/26
Contact	Mr. Ed Rice, President
Company	International Sportsmen's Exposition
Street	P.O. Box 2569
City	Vancouver
Prov.	WA
Postal	98668-2569
Phone	206 693 3700
Toll free	
Fax	
Booth Cost	550.00

Event	International Sportsmen's Exposit
Location	Eugene
Province	OR
Date	89/02/02- 89/02/05
Contact	Mr. Ed Rice, President
Company	International Sportsmen's Expositions
Street	P.O. Box 2569
City	Vancouver
Prov.	WA
Postal	98668-2569
Phone	206 693 3700
Toll free	
Fax	
Booth Cost	350.00

Event	International Sportsmen's Exposit
Location	Portland
Province	OR
Date	88/11/09 - 88/11/13
Contact	Mr. Ed Rice, President
Company	International Sportsmen's Expositions
Street	P.O. Box 2569
City	Vancouver
Prov.	WA
Postal	98668-2569
Phone	206 693 3700
Toll free	
Fax	
Booth Cost	500.00

Event	International Sportsmen's Exposit
Location	Seattle
Province	WA
Date	89/02/15 - 89/02/19
Contact	Mr. Ed Rice, President
Company	International Sportsmen's Expositions
Street	P.O. Box 2569
City	Vancouver
Prov.	WA
Postal	98668-2569
Phone	206 693 3700
Toll free	
Fax	
Booth Cost	550.00

Event	Pacific N.W. Sportsmen's Shows
Location	Portland
Province	OR
Date	89/02/08 - 89/02/12
Contact	Mr. Michael O'Loughlin
Company	To-Ro Trade Shows
Street	P.O. Box 25348
City	Portland
Prov.	OR
Postal	97225-0348
Phone	503 246 8292
Toll free	
Fax	
Booth Cost	450.00

Event	Regina Sportsmen's Show
Location	Regina
Province	SK
Date	89/03/02 - 89/03/05
Contact	Mr. Blaine Woit, Show Manager
Company	Canadian National Sportsmen's Show
Street	Suite 201, 4547 East Hastings
City	Vancouver
Prov.	BC
Postal	V5C 2K3
Phone	604 291 6651
Toll free	800 663 8815
Fax	604 291 0412
Booth Cost	425.00

Event	Seattle Sportsmen's Show
Location	Seattle
Province	WA
Date	89/01/25 - 89/01/29
Contact	Mr. Michael O'Loughlin
Company	To-Ro Trade Shows Inc.
Street	P.O. Box 110849
City	Tacoma
Prov.	WA
Postal	98411-0849
Phone	206 756 2121
Toll free	
Fax	
Booth Cost	450.00

Event	**Sport and Boat Show**
Location	**Sacramento**
Province	**CA**
Date	89/02/16 - 89/02/20
Contact	
Company	Sacramento Sport Show
Street	P.O. Box 19333
City	Sacramento
Prov.	CA
Postal	
Phone	916 482 8190
Toll free	
Fax	
Booth Cost	.00

Event	**Sport Fishing RV & Golf Show**
Location	**Palm Springs**
Province	**CA**
Date	89/02/01 - 89/02/05
Contact	
Company	Fred J. Hall & Associates
Street	15236 Greenleaf Street
City	Sherman Oaks
Prov.	CA
Postal	91403
Phone	818 784 3036
Toll free	
Fax	
Booth Cost	.00

Event	**Sport Fishing TRavel and OUtdoor**
Location	**Chicago**
Province	**IL**
Date	89/01/27 - 89/02/05
Contact	Ms. Ellen D. Farley, Asst. Vice President
Company	Professional Expo Management
Street	2400 E. Devon Ave., Suite 205
City	Des Plaines
Prov.	IL
Postal	60018
Phone	312 299 3131
Toll free	800 323 5155
Fax	
Booth Cost	350.00

Event	**The Toronto Sportsmen's Show**
Location	**Toronto**
Province	**ON**
Date	89/03/10 - 89/03/19
Contact	Mr. Derek Olsen
Company	Canadian National Sportsmen's Show
Street	595 Bay Street, Box 45
City	Toronto
Prov.	ON
Postal	M5G 2C2
Phone	416 593 7333
Toll free	
Fax	
Booth Cost	.00

Event	**Vancouver Hunting and Fishing Sho**
Location	**Vancouver**
Province	**BC**
Date	88/09/22 - 88/09/25
Contact	Mr. Rex Armstead
Company	Major Events Management
Street	600 - 1130 West Pender
City	Vancouver
Prov.	BC
Postal	V6E 2R6
Phone	604 681 6126
Toll free	
Fax	
Booth Cost	.00

Event	**Vancouver Sportsmen's Show**
Location	**Vancouver**
Province	**BC**
Date	89/04/06 - 89/04/09
Contact	Mr. Peter Kirk
Company	Canadian National Sportsmen's Show
Street	Suite 201, 4547 East Hastings
City	Vancouver
Prov.	BC
Postal	V5C 2K3
Phone	604 291 6651
Toll free	800 663 8815
Fax	604 291 0412
Booth Cost	500.00

Event	**Western Fishing and Tackle Show**
Location	**Long Beach**
Province	**CA**
Date	89/03/01 - 89/03/05
Contact	
Company	Fred J. Hall & Associates
Street	15236 Greenleaf Street
City	Sherman Oaks
Prov.	CA
Postal	91403
Phone	818 784 3036
Toll free	
Fax	
Booth Cost	.00

Event	**Western Fishing and Tackle Show**
Location	**San Diego**
Province	**CA**
Date	89/03/15 - 89/03/19
Contact	
Company	Fred J. Hall & Associates
Street	15236 Greenleaf Street
City	Sherman Oaks
Prov.	CA
Postal	91403
Phone	818 784 3036
Toll free	
Fax	
Booth Cost	.00

Event	**Western Fishing Tackle & Boat**
Location	**Phoenix**
Province	**AZ**
Date	89/04/05 - 89/04/09
Contact	
Company	Fred J. Hall and Associates
Street	15236 Greenleaf Street
City	Sherman Oaks
Prov.	CA
Postal	91403
Phone	818 784 3036
Toll free	
Fax	
Booth Cost	.00